

Power BI Implementation, Design and Delivery Services

Lot 3 – Cloud Support Services

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1. Description of Service

Summary

CACI's Power BI Migration service helps organisations move from legacy or mixed BI tooling to Microsoft Power BI in a controlled, low-risk way. The service covers readiness assessment, target architecture design, delivery through incremental releases, and enablement so internal teams can operate and extend the platform after go-live. It is suitable for migrations from platforms such as Business Objects, QlikView/Qlik Sense, SSRS and Excel-based reporting, and for organisations that need improved governance, security and consistency of reporting.



Who is it for and typical outcomes

- Organisations that want to modernise reporting and analytics onto the Microsoft Power BI platform.
- BI and IT teams that need a repeatable approach for migrating reports, models and processes with clear governance.
- Outcomes: a clear migration plan and target architecture; reduced reporting tool sprawl; improved consistency and transparency of metric logic; controlled security and access; a delivered set of migrated reports in Power BI; documented operational processes; and trained developers and end users.

2. Features and Benefits

Design (Power BI Readiness Assessment and Shaping)

- Stakeholder workshops and interviews to capture objectives, pain points and reporting needs.
- Review of current data architecture, including data sources, staging, transformations and warehouse/data mart layers.
- Review of the current reporting platform and a representative sample of reports to understand logic and dependencies (for example: universes/data providers, Qlik script and set analysis, SSRS database logic, Excel queries/VBA).
- High-level requirements catalogue captured as epics/user stories to form the basis of a delivery backlog.
- Proposed target architecture for data, semantic models and reporting.
- Licensing and software/tooling recommendations (Power BI licensing tiers and related Power Platform components where needed).
- Training, skills and resourcing requirements for delivery.

Delivery (Build and migrate in releases)

- Agile (Scrum) delivery with a product backlog organised by infrastructure and reporting streams.
- Data and Power BI infrastructure stream, typically including workspace strategy, security model, change control, reload strategy, and release/content promotion approach.
- Reporting stream, typically including semantic model build, report/dashboards build, paginated reporting where required, apps creation, and support for user testing.
- Incremental releases so value is delivered early and risk is managed.

Enablement and handover

- Developer training and hands-on knowledge transfer.
- End user training focused on navigating and using Power BI.
- Function-specific workshops (for example: deployment pipelines, row/column level security, Power Automate/Power Apps extensions).
- Content-specific workshops tailored to the delivered semantic models, database layers and security/workspace design.
- Operational handover sessions with customer BI/IT/management teams.
- Solution documentation, runbooks and a glossary of measures/metrics.
- Post-release bedding-in support and options for call-off support during the stabilisation period.

Excluded:

- Licensing costs for Microsoft Power BI or other third-party tools (these are recommended and procured by the buyer unless agreed otherwise).
- Remediation of poor source data quality beyond agreed migration tasks.
- Major re-engineering of source systems or enterprise data platform build unless explicitly included in scope.
- Bespoke application development unrelated to Power BI migration.

3. Onboarding and Offboarding

Prerequisites and dependencies

- Access to the buyer's existing reporting artefacts and environments (reports, models, schedules, source systems) for review.
- Availability of technical and business stakeholders for workshops, validation and sign-off.
- Microsoft tenant and identity approach (for example, Entra ID) aligned to the target Power BI design.
- Agreement on licensing approach and required environment structure (for example, Dev/Test/Prod).

Onboarding approach and indicative timelines

- Mobilise: confirm scope, roles, working practices and governance; agree a baseline release plan and initial RAID log.
- Understand and Shape: conduct workshops and architecture reviews; define objectives; produce requirements catalogue and target architecture; confirm licensing and enablement plan.
- Deliver: run time-boxed sprints with agreed release milestones for infrastructure and report/content migration.
- Enable and Assist: training, handover sessions, documentation and bedding-in support following each release.

Timelines depend on the number and complexity of reports, data sources, and governance requirements. A delivery plan is agreed during mobilisation.



3. Onboarding and Offboarding

Approach - Fusion Methodology

Our onboarding and implementation methodology is built on three pillars of delivery:

Shape - establishing the vision and foundations of the project, its structure and its governance, to afford clarity.

Create - ensuring that together, we build the project in the way that you need it to be built.

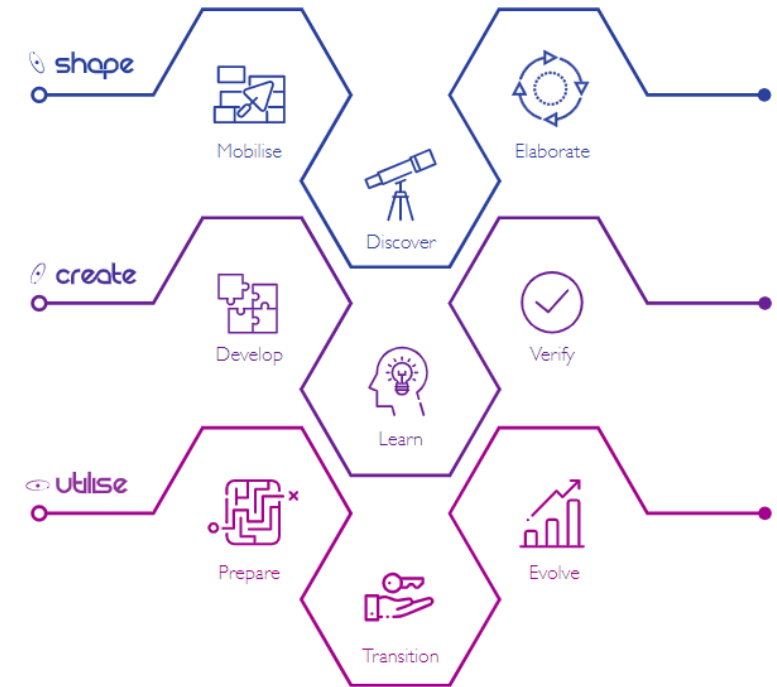
Utilise - setting your new solution live and building for the future.

Exit and data portability

- Project artefacts (requirements catalogue, architecture recommendations, backlog, runbooks and glossary) are provided at handover.
- Content is delivered into the buyer's Power BI tenant/environments (where applicable) to support ongoing ownership.

Assumptions

- Buyer provides timely access to existing reporting artefacts, data sources and stakeholders.
- The migration scope (reports, dashboards, semantic models and schedules) is agreed during mobilisation, and changes are managed through agreed change control.



4. Information Assurance and Security

Security, data residency and compliance

- Security design covering workspaces, apps, semantic models and dashboards.
- Role-based access design using security groups to minimise admin effort.
- Row-level and column-level security approach where required.
- Guidance on environment separation and controlled promotion of content.

Data residency and compliance requirements are addressed through the agreed Microsoft tenant configuration and the target architecture.

Key Security features included:

- Accredited to ISO27001, ISO9001, and Cyber Essentials Plus
- Data encrypted in transit and at rest
- UK data residency options
- Role-based access controls and least-privilege principles
- Privacy-preserving data handling and pseudonymization by default
- Compliance with NHS Data Security and Protection Toolkit
- Regular audits and alignment with NHS and NCSC cloud security guidance
- Artefacts and evidence of compliance available on request

5. Ordering and Invoicing Process

CACI PRIDES ITSELF IN BEING EASY TO DO BUSINESS WITH

With this in mind, we take an Agile approach to all our engagements, working closely with customers and their stakeholders to design and deliver cloud services in an iterative manner. This enables us to meet specific requirements as well as delivering value and benefit for our customers as early as possible.

Prior to the delivery commencing, our Engagement Manager will work with the customer to agree the outcomes for the engagement, including:

- Defining the success criteria and ensuring the commercials align
- Agreeing specific deliverables for the engagement
- Agreeing the specific ways of working and governance for the engagement
- Understanding the security constraints and ensuring the relevant clearances are in place
- Defining and agreeing the team size/resourcing required
- Putting the commercials in place in line with the G-Cloud framework.

We will then produce a proposal which contains a Services Supply Agreement, detailing the scope of work and the associated price. For details about our standard invoicing process, please refer to the Terms and Conditions document.

6. After Sales Support and Service Levels

ITIL STYLE SUPPORT

Service Levels - Detailed Overview

CACI's support service for the Health Informatics Cloud (HIC) is structured around ITIL principles and is designed to be flexible, reliable, and responsive to customer needs. Service is primarily delivered remotely, with on-site support available by agreement. The standard support window is Monday to Friday, 9am to 5:30pm (excluding UK bank holidays), but can be tailored by contract.

Incident Management and SLAs

- All incidents are logged and tracked in a CRM system, with clear status updates and historical records for analysis and improvement.
- Incidents are categorised by severity, which determines the target response and resolution times:
 - **Severity 1 (Critical):** 1-hour response, with continuous effort during service hours until resolution or workaround is delivered.
 - **Severity 2 (Major):** 4-hour response, resolution within 3 working days.
 - **Severity 3 (Minor):** 8-hour response, resolution within 10 working days.
 - **Severity 4 (Trivial):** 1-day response, resolution within 30 working days.

Escalation and Communication

- If an incident is not resolved within the expected timeframe, it is escalated through management levels, with the customer kept informed at each stage.
- Customers can access support and updates via phone, email, an online portal, and regular service management reports.
- Regular service reviews and relationship management meetings ensure ongoing alignment and continuous improvement.

Additional Features

- The support service includes problem management (root cause analysis and prevention), release management (controlled deployment of changes), and service request handling (such as access control).
- Customers are expected to provide trained contacts for first- and second-line support, and to participate in service reviews and change management processes.

This approach ensures that service levels are transparent, measurable, and adaptable to the needs of each customer, with a strong focus on communication, accountability, and continuous improvement.



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