

TABLEAU IMPLEMENTATION & MANAGED SERVICES

Service Definition
G-Cloud 15

REPLY

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SERVICE DESCRIPTION

Our Tableau Implementation & Managed Services offering provides end-to-end support for the design, delivery, and ongoing operation of the Tableau analytics platforms. The service is designed to help organisations realise value from their data through well-governed, scalable, and user-focused reporting solutions, supported by experienced analytics professionals.

Tableau Implementation Services

We deliver Tableau implementations covering discovery, design, build, and deployment. This includes requirements gathering with business stakeholders, data source assessment and preparation, dashboard and visualisation design, and best-practice implementation aligned to Tableau standards. Implementations are delivered using an agile approach, enabling early validation of insights, iterative refinement, and rapid time to value.

Managed Services and Ongoing Support

Following implementation, we provide a structured managed service to ensure the Tableau environment remains stable, performant, and aligned to evolving business needs. This includes handling support requests, incident and issue resolution, user and content administration, and ongoing enhancements to dashboards and data models. Services are delivered in line with agreed service levels and priorities.

As part of the managed service, we provide proactive monitoring and review of Tableau platform health, including dashboard performance, extract refreshes, usage trends, and content governance. Regular reviews help identify risks, optimisation opportunities, and areas for improvement, supporting long-term sustainability and adoption of the platform.

We support customers through Tableau upgrades and platform changes by reviewing upcoming releases, assessing potential impacts, and advising on readiness and testing activities. This ensures changes are introduced in a controlled manner and aligned to the customer's operating model.

Our service includes a consultative layer focused on continuous improvement. We provide best-practice advice on dashboard design, data visualisation standards, performance optimisation, and user adoption, helping customers mature their analytics capability over time.



ONBOARDING

Onboarding to our Tableau Managed Service is designed to be a seamless and collaborative journey. We recognise the intricacies of public sector operations and tailor our onboarding to meet the stringent demands of public service delivery.

Initial Engagement: Our onboarding commences with a thorough initial engagement process where we:

- **Conduct Workshops:** Lead discovery workshops to understand your organisational goals, challenges, and processes.
- **Define Objectives:** Clearly define the project objectives in alignment with public sector mandates and your strategic goals.
- **Establish Governance:** Set up a project governance structure to ensure oversight and successful delivery in line with the GDS framework.

Account Setup:

Following the initial engagement, we proceed with:

- **Secure Data Handling:** Establish protocols for secure data handling, adhering to the UK GDPR and public sector standards.
- **System Environment Setup:** Configure the Salesforce environment to align with your operational structure and security requirements.

Team Formation: A dedicated project team is assembled, comprising:

- **Certified Salesforce Professionals:** A blend of roles including project managers, business analysts, Tableau and Salesforce consultants, all bringing a wealth of experience and over 900 Salesforce certifications to the project.
- **Public Sector Specialists:** Advisors who understand the nuances of public sector work and can ensure that solutions are fit for purpose.

Stakeholder Engagement:

We engage stakeholders throughout the onboarding phase by:

- **Identifying Champions:** Working with you to identify internal champions who will drive the Tableau project within your organisation.
- **Communicating Expectations:** Clearly outlining roles, responsibilities, and expectations to all project stakeholders.

Customised Solution Blueprint: Our team crafts a tailored solution blueprint which includes:

- **System Design:** Architecting a Salesforce solution that is customised for your public sector needs.
- **Integration Plan:** Developing a comprehensive plan for integrating existing systems with Salesforce.

Knowledge Transfer and Training Plan: An integral part of our onboarding is the knowledge transfer:

- **Training Schedule:** We establish a training schedule that aligns with your team's availability and project milestones.
- **Resource Allocation:** Allocating resources such as user manuals, best practice guides, and access to our online training portal.

User Adoption Strategy: To ensure high levels of user adoption, we can also offer:

- **Communication Planning:** Crafting internal communication plans to keep all users informed and engaged.
- **Create Adoption Metrics:** Setting up metrics to measure adoption rates and user engagement.

Support Structure Establishment: A robust support structure is established, providing:

- **Dedicated Support Channels:** Offering dedicated communication channels for any enquiries or support needed throughout the onboarding process.
- **Early Life Support:** Implementing an early life support system to swiftly address any challenges that arise as users start interacting with the new system.

Transition to Project Delivery: The onboarding phase concludes with a smooth transition to the project delivery phase, which involves:



- **Project Plan Sign-off:** Obtaining formal sign-off on the project plan, ensuring all parties are aligned on the delivery timeline and outcomes.
- **Kick-off Meeting:** Hosting a kick-off meeting to mark the beginning of the project implementation phase, bringing together all stakeholders.

Our onboarding process is designed to ensure that your transition to our service is well-planned, secure, and sets a solid foundation for a successful implementation. We partner closely with your team to not only onboard the technology but also to foster a culture ready to embrace digital transformation.



OFFBOARDING

The offboarding process from our Tableau services is approached with as much diligence and attention to detail as our onboarding. We ensure a structured and transparent transition, whether moving to another phase of the project, handing over to an in-house team, or transitioning to another supplier.

Transition Planning: We initiate offboarding with a detailed transition planning phase, which involves:

- **Transition Workshops:** Conduct workshops with all relevant stakeholders to discuss the scope and timeline of the offboarding process.
- **Documentation Review:** Ensure that all documentation is up-to-date, comprehensive, and easily understandable for the succeeding team or supplier.
- **Data Extraction and Handover:** A critical component of offboarding is the secure and orderly transfer of data.
- **Data Extraction:** Extract all relevant data from the Salesforce system, following the highest standards of data security and integrity.
- **Data Handover:** Transfer data to the designated system or team, ensuring compatibility and usability, accompanied by detailed data maps and schemas.

Knowledge Transfer: We conduct a thorough knowledge transfer to the succeeding team or supplier, which includes:

- **Debrief Sessions:** Detailed sessions explaining the system architecture, configurations, custom developments, and operational processes.
- **Handover of Materials:** Provision of all training materials, system manuals, and user guides to the incoming team.

Offboarding to Another Supplier: Should the service be transitioning to another supplier, we ensure:

- **Supplier Engagement:** Engage with the incoming supplier throughout the offboarding process for a seamless transition.

Final Audit and Closure: We conclude offboarding with:

- **Offboarding Audit:** Perform an audit to ensure that all contractual and service obligations have been fulfilled.
- **Closure Meeting:** Hold a final meeting with all stakeholders to confirm the completion of the offboarding process and to formally close the project.

Our offboarding process is designed to be comprehensive, secure, and considerate of future public sector needs. It ensures that there is no loss of service quality or data integrity, and that your team or the succeeding supplier is fully equipped to take over the Salesforce environment with confidence.

Access to Data

Ensuring uninterrupted access to client data upon exit is a critical component of our offboarding process. We adhere to strict protocols to guarantee that your organisation maintains full control and accessibility to all its data, aligning with public sector standards and data protection laws.

Data Retrieval and Accessibility:

- **Comprehensive Data Export:** We facilitate a comprehensive export of all client data from the Salesforce platform. This includes records, reports, dashboards, and custom objects, ensuring that you have access to all necessary data in a usable format.
- **Secure Data Transfer:** The transfer of data to the client or a new supplier is conducted securely, using encrypted channels to prevent any unauthorised access or data breaches.

Documentation and Mapping:

- **Data Mapping:** We provide detailed data mapping documents that outline the structure of the data within Salesforce, facilitating a clear understanding of how data is organised and can be integrated into new systems.
- **Documentation on Data Use:** Comprehensive documentation is provided, detailing how data within Salesforce was used and managed. This includes customisations, workflows, and processes that



interacted with the data, offering insights into its application within the platform.

Legal and Compliance Considerations:

- **Data Protection Compliance:** Our offboarding process complies with all relevant data protection laws, including the UK GDPR. We ensure that all data handling during offboarding respects the confidentiality and integrity of client data.



SECURITY

Personnel Security

As a Specialist Cloud Service, the capability being offered is not limited to specific Impact levels (as it is not infrastructure, software or a platform) and can be used, subject to personal Security Clearance levels. Reply consultants are mostly Security Cleared (SC), some have higher-level Developed Vetting (DV) clearances. We also have a pool of NPPV3 Consultants for Policing work. The majority of our work for both public and private sector clients is at IL2 but we work in the Official, Secret and Top-Secret domains. Our hard and soft information security processes have been designed and approved by independent CESG CLAS accredited consultants.

Information Security

We are ISO27001, Cyber Essentials certified and our Quality Assurance processes are based upon and compliant with our ISO 9001 accreditation. Our Information Security processes are directly guided by our ISO27001 accreditation. We shall adhere to local information and other security policies and will apply local Security Operating Procedures (SyOPs) as may exist. If such do not exist we shall apply our own SyOPs.

Physical Security

The Main Reply Office (London, UK) is a Police Accredited Secure Facility (PASF) with access controls for each point of entry. All Laptops/Phones must be stored securely overnight. When working on a client-site our consultants adhere to client security policies.



TRAINING & KNOWLEDGE TRANSFER

Our approach to training and knowledge transfer is built on the foundation of empowering public sector organisations to maximise their investment in Salesforce. As a summit Salesforce partner with a commitment to delivering exceptional public sector solutions, we offer a comprehensive training programme designed to cater to all levels within your organisation.

Customised Training Programmes: Understanding that different roles within your organisation require different levels of Salesforce knowledge, we offer customised training programmes:

- **Administrator and Developer Training:** Comprehensive training for Salesforce administrators and developers, covering system configuration, custom development, best practices, and security to ensure your team can fully support and extend the Salesforce platform.
- **End-User Training:** Role-specific training designed to ensure that all users can efficiently utilise Salesforce in their daily tasks, enhancing productivity and service delivery to the public.

Methodology: Our training methodology is inclusive, engaging, and designed for maximum knowledge retention:

- **Blended Learning Approach:** Combining instructor-led training, hands-on workshops, e-learning modules, and interactive webinars to cater to different learning styles and schedules.
- **Train-the-Trainer Model:** Equipping selected staff members with the knowledge and tools to train other users, ensuring sustainable Salesforce expertise within your organisation.

Knowledge Transfer: Our knowledge transfer process ensures your team has the information and confidence needed to manage and optimise Salesforce long after our formal engagement concludes:

- **Documentation and Resources:** Providing comprehensive documentation, including user manuals, configuration guides, and best practices, all tailored to your specific Salesforce environment.
- **System Handover Workshops:** Conducting detailed sessions to transfer knowledge about the customised Salesforce solution, including the architecture, custom code, integrations, and operational procedures.
- **Q&A Sessions:** Regularly scheduled Q&A sessions during and post-training to address any lingering questions and ensure clarity and confidence in using the system.



ORDERING AND INVOICING PROCESS

To begin the process, please contact glue.frameworks@reply.com with details of your organisation, role and high-level requirements.

Our Framework Manager will connect you to our experts and from here we will organise an introductory discussion to go into more detail and shape a proposed engagement that suits your needs.

We invoice for both fixed price and time and materials engagements one month in arrears. For fixed price engagements, this takes place upon completion of the deliverable(s), or in stages, if the size of the engagement is greater than £40,000 excluding VAT.

Payment terms are 30 days net of receipt of invoice.



CUSTOMER RESPONSIBILITIES

For the successful implementation of Salesforce solutions within the public sector, a collaborative partnership between our team and the client is essential. Some client responsibilities can include:

- **Clear Communication:** Maintaining open and consistent communication channels with our project team.
- **Dedicated Team Members:** Allocating dedicated internal team members who will work closely with our project team.
- **Time Commitment:** Ensuring that all required participants from your organisation can dedicate the necessary time, depending on the activities required for their role.
- **Data Preparation:** Assisting in the preparation and cleansing of data to be migrated into the Salesforce platform, ensuring accuracy and completeness.
- **System Access:** Providing our team with timely access to existing systems.
- **IT Support:** Ensuring that your IT infrastructure is prepared for the Salesforce implementation.
- **Change Leadership:** Demonstrating strong leadership to drive change and adoption of the Salesforce solution across the organisation.
- **User Adoption Strategy:** Collaborating with us to develop and implement a user adoption strategy, including communication, training, and support plans.
- **Security Requirements:** Communicating any specific security requirements or protocols that need to be integrated into the Salesforce solution.
- **Constructive Feedback:** Providing timely and constructive feedback throughout the project lifecycle.
- **Success Metrics:** Working together to define and agree on success metrics and evaluation criteria to assess the project's outcomes.
- **Risk Management:** Participating in risk management activities, including the identification, assessment, and mitigation of potential risks to the project.
- **Budget Management:** Ensuring timely approval of budgets and efficient management of project finances in line with agreed contracts and milestones.
- **Payment Schedules:** Adhering to agreed payment schedules to ensure the smooth progression of the project.



ABOUT REPLY

Reply is a company that specialises in Consulting, Systems Integration and Digital Services with a focus on the conception, design and implementation of solutions based on the new communication channels and digital media.

Reply partners with key industrial groups in defining and developing business models made possible by the new technological and communication paradigms such as Artificial Intelligence, Big Data, Cloud Computing, Digital Communication, the Internet of Things and Mobile and Social Networking. In so doing, it aims to optimise and integrate processes, applications and devices.

Reply's offer is aimed at fostering the success of its customers through the introduction of innovation along the whole economic digital chain. Given its knowledge of specific solutions and due to a consolidated experience, Reply addresses the main core issues of the various industrial sectors.

Through its network of specialist companies, Reply supports some of Europe's leading industrial groups in Telco & Media, Industry & Services, Banks & Insurance, and Public Administration to define and develop business models, suited to the new paradigms of Artificial Intelligence, Big Data, Cloud Computing, Digital Media and the Internet of Things.

We make innovation happen.

We started with a small team and a purpose: to help the digital revolution happen. Today, we are a team of more than 14,600 people in 16 different countries but we still have the same DNA, made up of agile, vertical task forces and an inner passion for innovation.

We are a decentralised network of specialised companies.

Among Replyers, you will find passionate geeks, visionary strategists, and creative minds, each with sharp skills in a specific business, who cooperate together and never stop learning from each other.

Make forward, act sustainably.

We know a sustainable future is possible and technology can be a strong asset to reach it. As leaders in digital transformation, we push for change and operate in full accordance with the highest ethical standards and with respect for the rights of future generations