Qlik® Consulting helps you accelerate time to value, mitigate risk, and achieve better ROI.
New Installations
- Qlik® Foundation
- Initial Delivery Enablement Framework
- Platform Architecture and Infrastructure
- Application Discovery
- Qlik® Sense Fast Start
- Partner Success Services

Existing Installations
- Application Assessment and Remediation
- Infrastructure Review
- Security and Integration Workshop
- Scalability Testing
- QlikView Server Platform Upgrade
- Qlik Migration

Additional Services
- QlikView® NPImaging Foundation
- Custom Applications

Qlik Consulting Accelerators
- Qlik Sales Accelerator Suite
- Qlik Travel Insights Accelerator
Introduction

The Qlik® Americas Consulting Catalog is a comprehensive collection of offerings, developed over time from our extensive experience working with hundreds of clients. We can help you through your entire lifecycle – from setting up your infrastructure, to building and implementing applications, to providing additional proactive and preventative service to ensure your Qlik solutions are working effectively and efficiently.

Our offerings can be purchased stand-alone or as part of a packaged, long term strategy. Our highly trained consultants work as an extension to your company’s internal resources, providing you with superior levels of expertise and personal attention from a dedicated specialist team.

We’ve recently introduced “Custom Applications” and “Consulting Accelerators” to our offerings as way to help fast track customers to maximize their Qlik investment. As new custom applications and accelerators are developed, we will continue to update our catalog. Please refer back often to see our latest offerings!
New installations

For new customers, or for deployment of new instances of QlikView® or Qlik® Sense, we provide a set of consulting services to ensure that your platform architecture is ready and scalable.
Qlik® Foundation

A set of four offerings to assist setting up the Qlik Platform and Foundation, mitigating risk and improving time to value.

**When**
New platform

**Where**
Onsite and Remote

**Estimated Duration**
15-30 Days

**Benefits**
- Risk Mitigation
- Lower TCO
- Improved Efficiency
- Leverage QlikView Investment

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**New Installations**
- Qlik® Foundation
  - Start Up
  - Initial Delivery Enablement Framework
  - Platform Architecture, Installation and Integration
  - Operations and Administration
- Initial Delivery Enablement Framework
- Platform Architecture and Infrastructure
- Application Discovery
- Qlik Sense Fast Start
- Partner Success Services

**Existing Installations**
- Application Assessment and Remediation
- Infrastructure Review
- Security and Integration Workshop
- Scalability Testing
- QlikView Server Platform Upgrade
  - Discovery Phase
  - Implementation Phase
- Qlik Migration

**Additional Services**
- QlikView NPrinting Foundation
  - Activities
- Custom Applications
  - Sales Optimization
  - Manufacturing Project Tracking

**Qlik Consulting Accelerators**
- Qlik Sales Performance Accelerator Suite
  - Modules
- Qlik Travel Insights Accelerator
  - Key Features and Analytics
Qlik® Foundation – Start Up

Objective
Build consensus on holistic solution vision

Scope
• High Level Roadmap and Scope
• Requirements Identification
• Customer Key Success Factors
• Identify Key Stakeholders
• Qlik Key Concepts
• Initial Planning

Deliverable
High-Level Roadmap and Key Activities
Qlik® Foundation –
Initial Delivery Enablement Framework

Objective
Establish a robust development environment to facilitate and control an agile Qlik development process in line with Qlik leading practices

Scope
• Processes, methodology (sandboxing and prototyping)
• Naming standards, coding and parameters
• Security standards
• Test procedures
• Guidelines and templates (design, development)

Deliverables
• Deployment framework installed and configured
• Development and design guide
Qlik® Foundation – Platform Architecture, Installation and Integration

**Objective**
Setup the Qlik platform according to Qlik leading practices and in alignment with customer requirements and roadmap

**Scope**
- Infrastructure and architecture workshop
- Installation
- Configuration
- Validation
- Backup and restore plan

**Deliverables**
- Installed and verified Qlik platform
- System architecture documentation
Qlik® Foundation –
Operations and Administration

Objective
Define and document strategic and operational guidelines for persistent success

Scope
• Define roles, responsibilities, skills and training plan
• Qlik operations
• Define operational standards
• Operational efficiency tools

Deliverable
Operational Handbook (Operations, Monitoring, Administration)
Initial Delivery Enablement Framework

Establish a robust development environment to facilitate and control an agile Qlik development process in line with Qlik leading practices.

**When**
Qlik foundation or standalone

**Where**
Onsite and remote

**Estimated Duration**
5-10 Days

**Benefits**
- Consistent application architecture
- Risk Mitigation
- Lower TCO

**Activities**
- Current state assessment
- Roles, responsibilities and skills
- Processes, methodology (sandboxing and prototyping)
- Qlik deployment framework
- Naming standards, coding and parameters
- Security standards
- Test procedures
- Design considerations
- Guidelines and templates (design, development)
- Qlik environments (development, test, acceptance and production)

**Deliverables**
- Deployment Framework installed and configured
- Development and design guide

**Participants**
Qlik developer, IT architect and security teams, business stakeholders

**Pre-Requisites**
If present, existing customer environment documentation, current processes, stakeholders, etc.
Setup the Qlik platform according to Qlik leading practices and in alignment with customer requirements and roadmap.

**When**
Qlik foundation or standalone

**Where**
Onsite and remote

**Estimated Duration**
5-10 Days

**Benefits**
- Best practice implementation
- Installed, documented and validated Qlik Platform

**Deliverables**
- Installed and verified Qlik Platform
- System architecture documentation

**Activities**
- Infrastructure and architecture workshop
- Environment sizing
- Installation
  - High availability
  - Load balancing
- Configuration
- Validation
- Backup and restore plan

**Participants**
Qlik Technical Architects, System Owner, IT-Resources, and etc.

**Pre-Requisites**
If present, existing customer environment documentation, current processes, stakeholders, etc.
Application Discovery

Review business and technical requirements and build the initial project charter, technical architecture and project-plan to enable scoping of resources, timescales and objectives.

**When**
When you need to scope an application project

**Where**
Onsite and remote

**Estimated Duration**
5-10 Days

**Benefits**
- Utilize existing Qlik experience
- Reduce risk and control costs

**Activities**
- Assess business requirements and analysis needs
- Source data analysis and validation
- Key metrics and data modeling
- Application UI requirements
- Data extract methods and scripting
- Integration and security needs
- Risk analysis and mitigation plans
- Project planning workshop

**Deliverable**
High-level project plan including scope, schedule, resources, time-scales and dependencies.

**Participants**
Qlik Developers, Business Analyst, IT architecture and security teams, key stakeholders, etc.

**Pre-Requisites**
Access to the Qlik development environment and source systems
Qlik® Sense Fast Start offers a team of skilled professionals to ensure that your business and IT teams can deliver your first Qlik Sense applications on a scalable analytics platform.

When
New Qlik Sense deployment

Where
Onsite

Estimated Duration
15 Days

Benefits
• Qlik Sense application optimized for your enterprise
• A repeatable pattern for rapid user adoption

Deliverables
• Each engagement enables your business and IT teams to deliver a fully functional Qlik Sense application optimized for your enterprise.
• Documented templates, designs and process ensure a quick start and quick wins

Participants
Business analyst, IT architecture and security teams, key stakeholders, etc.

Pre-Requisites
Access to the Qlik Sense development environment, source systems and project team(s)

Typical Activities
• Project initiation and UX workshops
• Data modeling and ETL scripting
• 1-2 very rapid development sprints
• Application platform deployment
• Production support and documentation

Optional Services
• A cloud-ready development environment to prototype and showcase your designs
• Advanced web development skills to integrate apps and Sense extensions
• Customized portal and security solutions for others partners and customers
Partner Success Services

Compliment your existing partner resources with Qlik Partner Success Services. Designed to provide the right Qlik expertise at the right time with guidance, advice, reviews, assessments and assistance.

**When**
At any phase of your Qlik implementation

**Where**
Onsite and remote

**Estimated Duration**
15 Days

**Benefits**
- Reduce risk and control costs
- Validation and knowledge transfer to your Qlik development team

**Deliverables**
- Best practice planning and design to successfully deploy Qlik solutions.
- Qlik Consulting pass their experience and proven practices to your teams, helping you become increasingly self-sufficient while placing you on a guided path to long-term and sustainable success.

**Participates**
Business analyst, IT architecture and security teams, key stakeholders, etc.

**Pre-Requisites**
Access to the Qlik development environment and source systems and project team(s)
Existing Installations

For customers that already have QlikView® or Qlik® Sense, we offer additional consulting services that ensure that your platform and applications are performing at their best.
Application Assessment and Remediation

When there is a performance issue with a Qlik® application, or prior to adding more users, we recommend engaging Qlik Consulting to assess and tune your application. The application review will identify areas that are impacting usability, performance, scalability or maintainability of the Qlik application. Approved changes will be made to the application, time permitting.

The Application review targets a single Qlik application

**When**
Test, development or on demand

**Where**
Onsite

**Estimated Duration**
5-15 days

**Benefits**
- Minimize risk
- Recommendations to improve performance, scalability, maintainability, and adoption
- Drive adoption of best practices

**Deliverable**
Report containing findings and actionable recommendations and approved changes that have been made.

**Participants**
Qlik developers and Qlik administrators

**Pre-Requisites**
Access to the Qlik application
Infrastructure Review

The Infrastructure Review will assess your current Qlik environment based on Qlik’s leading practices, and identify areas that impact performance, usability and maintainability. Recommendations will be made during the process to increase stability or performance and changes will be made, time permitting.

When
Stand alone

Where
Onsite and off-site

Estimated Duration
5-10 days

Benefits
Identify and correct performance and stability issues in the Qlik environment

Deliverable
Qlik will create a document that summarizes the final configuration and any recommendations for future changes to the Qlik Server and Publisher environments and any changes that have been made at the customer’s direction.

Participants
Qlik Technical Architect and Customer IT Stewards

Pre-Requisites
Appropriate access to the supporting Qlik environment and access to a IT and business owners as needed.
Security and Integration Workshop

The security and integration workshop will align customer internal and/or external security requirements with Qlik® security best practices. The goal is to establish a reusable security foundation for long term Qlik success. Also available for new installations.

Work is done in close cooperation with customer’s security and IT personnel, in a workshop format.

**When**
Stand alone

**Where**
Onsite or remote

**Estimated Duration**
5-10 days

**Benefits**
- Get tangible recommendations of security setup
- Align Qlik with corporate security policy
- Align Qlik with legal and compliance requirements

**Activities**
- Existing authentication providers
- Single Sign-On (SSO) integration considerations
- Internal/External needs
- Authentication and authorization
- Compliance and legal requirements
- Auditing needs
- Communication and encryption needs E.G. SSL

**Deliverable**
Report containing recommendations

**Participants**
Customer’s security and IT architecture team

**Pre-Requisites**
Customer should be able to describe existing security solution and future requirements
Scalability Testing

A Scalability Test will help validate that your applications will scale and be able to handle the anticipated number of users or an increase in the amount of data loaded into an application. It is especially relevant in situations such as user volume growth, new application development, upgrades, migrations or benchmarking hardware to identify the ideal platform to deliver Qlik products on.

**Why**
Performance problems, performance tuning, adding large number of users, upgrades

**Where**
Onsite and remote

**Estimated Duration**
5-15 days

**Benefits**
- Validate platform
- Quality in deployment
- Risk mitigation
- Validate application performance

**Deliverable**
A scalability report with findings

**Activities**
- Preparation of client and server side tools and configuration
- Validation of the testing environment
- Define relevant user scenario(s) and concurrent sessions
- Validation run of test script
- Final preparation of the test scripts for scenario(s)
- Conduct performance test(s)
- Analyze the test results and write scalability report
- Present the results and hand over report to customer
- Knowledge transfer

**Participants**
Qlik System Owner, Qlik Stakeholders and IT-Operations

**Pre-Requisites**
- Access to Qlik environment
- User accounts
- Recommended: completed infrastructure and application review
- Dedicated server for load generation
- Qlik server licenses
- Creation of use case scenarios
QlikView® Server Platform Upgrade

The QlikView platform upgrade service provides a framework for managing and completing your upgrade. Platform Upgrades are delivered in two phases.

**When**
Upgrading QlikView

**Where**
Onsite and remote

**Estimated Duration**
10-20 days (both phases)

**Benefits**
- Benefit from existing global experience
- Mitigate risk
- Expand your QlikView usage
- Time to value
QlikView® Server Platform Upgrade – Discovery Phase

**Deliverables**
- Discovery report containing an analysis of your current environment, future requirements and goals.
- High-level upgrade plan
- Identified key activities and resources including training needs.
- Identified areas for additional optimization, enhancements

**Activities**
The Discovery phase starts with a QlikView architecture-planning workshop to review your readiness to upgrade. Qlik consultants will work with you to define the upgrade approach and build an upgrade plan including areas:
- Validation
- Risk mitigation
- Identifying areas who may need special consideration
- Success and acceptance criteria
- Rollback plan
QlikView® Server Platform Upgrade – Implementation Phase

**Deliverables**
- Installed, configured and validated Qlik platform according to the plan
- Documented Qlik environment
- Assist with identifying relevant operational documentation that needs to be updated
- Knowledge transfer

**Activities**
Execution of the upgrade based on the upgrade plan defined in the previous phase. Our consultants follow a well-defined methodology including execution and validation. The implementation phase ends with a closing activity to summarize the work.
Qlik® Migration

Sooner or later, every organization that has invested in Business Intelligence (BI) solutions faces the challenge of migrating or upgrading their current BI platform.

Our BI migration service can help your organization leverage your current investment when migrating to Qlik. With the Qlik migration service, you minimize any disruptions and risks with your daily operations. You stay focused on running your business while we help you migrate to Qlik.

When
Migrating to Qlik

Where
Onsite and remote

Estimated Duration
The approximate duration is determined by your specific requirements. For planning purposes, an estimated elapsed time of two business weeks is assumed for the discovery-phase.

Benefits
• Standardization of applications
• Scalability
• Consolidated BI platform and BI application
• Using Qlik thought leadership experts

Discovery
• Assessment of current reports and platform
• Determine which reports are most business critical
• Identify reports that could be consolidated
• Identify which reports that are no-longer in use
• Propose new architecture and Visual Analytics platform
• Defined migration approach
• High level project schedule including business case

Planning
• Detailed work breakdown structure
• Plan migrations activities including project plan

Execution
• Execute according to agreed project plan
• Install and configure the Qlik Visual Analytics platform
• Migrate applications into Qlik
• Test and validate applications and the Visual Analytics platform

Deployment
• Train and educate users
• Deploy and roll out the Visual Analytics platform and applications according to agreed plan

Activities
First, and most importantly, we conduct an assessment of current use and reports. The goal of the assessment is to determine which reports are most critical to the business, which ones that can be consolidated to make them more efficient, and which ones that no longer are in use.

Consulting

New Installations
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  – Start Up
  – Initial Delivery Enablement Framework
  – Platform Architecture, Installation and Integration
  – Operations and Administration
• Initial Delivery Enablement Framework
• Platform Architecture and Infrastructure
• Application Discovery
• Qlik Sense Fast Start
• Partner Success Services

Existing Installations
• Application Assessment and Remediation
• Infrastructure Review
• Security and Integration Workshop
• Scalability Testing
• QlikView Server Platform Upgrade
  – Discovery Phase
  – Implementation Phase
• Qlik Migration

Additional Services
• QlikView NPrinting Foundation
  – Activities
• Custom Applications
  – Sales Optimization
  – Manufacturing Project Tracking

Qlik Consulting Accelerators
• Qlik Sales Performance Accelerator Suite
  – Modules
• Qlik Travel Insights Accelerator
  – Key Features and Analytics
Additional Services

We offer customized consulting services, tailored to your specific needs, or for use with our other products and services.
QlikView® NPrinting Foundation

By leveraging existing QlikView deployments, using templates in Word, Excel, Powerpoint, and HTML, we can help you deploy a solution that distributes the right information, at the right time, to the right recipients and in multiple formats.

When
On demand

Where
Onsite and off site

Estimated Duration
5 days

Deliverable
Document of the QlikView NPrinting configuration and first published reports

Benefits
- Get started with reporting
- Enable developers and operations
- Secure your QlikView reporting environment for future growth

Participants
Business process owners, System owner, IT-resources, etc.
QlikView® NPrinting Foundation – Activities

**Day 1 – Planning Workshop with Business and IT**
- Scope reporting needs, current and future
- Decide on initial reports for day 4
- QlikView NPrinting Desktop and development environment
- QlikView NPrinting Server and distribution environment

**Day 2 – Installation and Configuration**
- Install and tune server
- Verify installation
- Folder structure, user groups, and security
- Validate security configuration
- Install designer

**Day 3 – Knowledge Transfer**
- QlikView NPrinting overview and knowledge transfer
- Publishing with QlikView NPrinting: Reports, Tasks, Recipients, Schedules, Filters

**Day 4 – Implementation Workshop**
- Build business defined QlikView NPrinting reports
- Import recipients
- Distribute reports with filters, conditions, etc.
- Schedule and promote to production

**Day 5 – Post Production Check Point**
- Reserved for a follow-up session(s) to be delivered remotely
- Book your enablement sessions remotely or onsite to further your capability with QlikView NPrinting
Qlik® Consulting can help you build your custom applications, as we have for hundreds of other customers. We have the expertise to define your business requirements, design a custom model based on your unique data sources, and develop intuitive analytical visualizations that help answer your business questions — all while ensuring that your application will scale to future growth. Additionally, we help enable your internal team to maintain and enhance the application going forward.
To continuously improve sales performance, most organizations need:

- Custom applications
  - Sales optimization
  - Manufacturing project tracking
- Sales operational frameworks that enable field staff to monitor sales performance and react to changes while deals are still in the pipeline
- A dashboard view with drilldown analysis capabilities providing in-depth insights into their pipeline, territories, sales personnel and account plans
- Ability to adjust to shifting organizational, market and competitive conditions, as well as differing sales processes across multiple territories
- An analytics application built on a robust Visual Analytics platform that can easily adapt to multiple and changing data sources, avoiding ad hoc, manually intensive processes

Qlik® Sales Optimization enables consistent sales processes globally

We developed our own Qlik-based solution, based on Salesforce.com, called Sales360, where we have combined industry-proven practices and best-in-class analytics to provide a real world solution which is at the heart of our Qlik internal sales operations. This holistic solution has supported Qlik’s growth and is now being offered to our customers to help enable their sales optimization.

Qlik Consulting

Qlik offers end-to-end consulting services to help customers transform their sales operations, based on practices from Sales360, which can be easily adapted for any CRM-based solution. Our experts will assess underlying business processes while also developing an analytics application that ultimately brings a solution to life within a customer’s environment.
Custom Application – Manufacturing Project Tracking

To ensure on-time delivery of large/complex projects, organizations need to:

- Monitor activities, resources, process steps and parts in a complex non-assembly line manufacturing environment
- Quickly assess progress and potential causes for delays across multiple assembly projects of large manufactured products (i.e., machinery, airplanes, etc.)
- Utilize an application that is intuitive for shop floor workers to identify their assigned projects/tasks and for shop floor managers to quickly identify projects at risk for completing on time

Business Questions Answered

- What is the current status of all assembly projects?
- Which projects are currently on track or behind schedule?
- Which projects are a single resource assigned to?
- Which projects are waiting on parts?
- Which projects have had delays due to errors or missing parts?

Return-on-Investment

- Reduction in time for Shop Floor Managers to look at multiple data sources to determine project status and reasons for delays
- Ability to counter delays in production by having more frequent updates on progress
Qlik® Consulting Accelerators

Introduced in 2015, we now offer a set of consulting services to help accelerate the building and implementation of custom applications. Consulting Accelerators are production-ready applications that are designed by industry experts, built by Qlik® experts, and pre-tested so that once your data is loaded, the application is ready to use and scale to your business.
Qlik® Sales Performance Accelerator Suite

To continuously improve sales performance, most organizations need:

- Sales operational frameworks that enable field staff to monitor sales performance and react to changes while deals are still in the pipeline
- A dashboard view with drilldown analysis capabilities providing in-depth insights into their pipeline, territories, sales personnel and account plans
- Ability to adjust to shifting organizational, market and competitive conditions, as well as differing sales processes across multiple territories
- An analytics application built on a robust data discovery platform that can easily adapt to multiple and changing data sources, avoiding ad hoc, manually intensive processes

Qlik Sales Performance Accelerator Suite enables your sales framework fast

Built on our leading-edge Data Discovery platform, the Sales Performance Accelerator Suite offered by Qlik Consulting Services is a set of pre-built applications to get you up and running quickly on a real world sales framework.

The configurable solution comes with an industry-proven data model, KPI’s and analytics, pre-tested and ready to accept your data. We also know that every company has their own unique business needs. Therefore, the Sales Accelerator Suite creates the perfect foundation for future customizations.
The Sales Performance Accelerator Suite is made up of multiple Qlik® Applications or Modules, built on a Foundation Layer ready to accept data. The single data model and configurable approach means each Module can be used to enhance the analytics of another Module.

**Foundation Layer:** This layer contains the user interface template and data model which is adaptable for any CRM-based system such as Salesforce.com, and is used by all applications. Pre-built hierarchy tables for the most commonly used dimensions that can be configured to your specific business needs. Examples include: business unit, segment, geography, product, sales org, territory, and customer.

**Sales Analytics:** Analytical insights and data discovery through all dimensions for sales, margin, customer count, and transaction detail. Complete sales analysis tool, ready to use out-of-the-box.

**Forecast and Pipeline Management (Q3 2015):** Workflow-based application that goes beyond traditional reporting and analytics, enabling sales members to maintain a healthy pipeline and forecast more accurately, while providing sales management visibility to effectively monitor and coach their team.

**Account Planning and Management (H2 2015):** Utilizing additional data sources for communications and website activity, this application ups the level of account management to ensure sales team members are focusing on the right opportunities.

**Territory Planning and Management (2016):** Incorporating external market data to provide insights on where sales leadership should focus their resources to improve market share and drive sales.

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**Note:** The Foundation Layer is required for use with any module, but only needs to be purchased once. Each Module can be purchased stand-alone or used with other modules. Additional Consulting Services are required to deploy, customize, and extract, transform and load data. Sales Performance Accelerator Suite will be released for general availability per the dates shown above.
Qlik® Travel Insights Accelerator

To effectively manage travel costs, most organizations need:
• End-to-end visibility into where travel dollars are spent and how to recapture lost savings
• To align expense policies with the realities of today’s business travel
• To identify opportunities to negotiate better discounts with your preferred vendors and to forecast projected cost savings accurately
• An analytics application built on a robust data discovery platform that provides intuitive data visualizations to immediately zero in on any outliers and undiscovered patterns

Qlik Travel Insights Accelerator helps recapture lost savings
With the Qlik Travel Insights Accelerator, expense managers can see all employee travel information and expenses globally, consolidated across the organization. Travel Insights gives you full visibility into spending patterns from a single platform to find lost savings, predict future patterns, refine travel policies and identify new preferred vendors.

The Qlik Travel Insights Accelerator can be accessed from anywhere in the world, including your desktop browser, tablet or smartphone. With full user-defined secure access, you can use the cloud or your own data center to deliver the application globally. Leverage a proven model to load data from your internal corporate systems or external agency booking and expense applications, ready to work with Concur®.
Qlik Consulting developed Travel Insights Accelerator by combining industry-proven practices and best-in-class analytics to provide a real-world solution that delivers immediate cost savings. The configurable application, ready to accept data, provides an excellent starting point for corporate clients to answer almost every conceivable question using your data.

- Perform in-depth cost analysis on total trip expenditures by airfare, hotel, car rental and other transportation and lodging, using dozens of attributes
- Calculate airfare savings using preferred airlines and comparable alternative routes
- Analyze advanced-purchase effectiveness for purchasing flight 14 days or prior to the departure date
- Visualize alternative routes for popular and non-compliant travel departures and arrivals
- Calculate total compliance as a percentage of total booking
- Identify flights purchased above the highest fare Advanced Purchase Days by business unit and average flight cost
- Calculate total lost savings by hotel location, comparing room rates with average cost by city and preferred hotel agreements
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