



# Transportal Consultancy Services

# Our Consultancy Services



## Consultancy

In addition to assisting with the initial guidance, setup, and scope of delivery of our software, we have dedicated consultancy and support staff who aid in introducing and implementing our CDE product across your site or organisation.

Transportal team members are highly regarded within the industry and have successfully rolled out our CDE product across various businesses and projects.

We can support the production of your process documentation, including Employer's Information Requirements, Information Delivery Plans, Implementation Plans, and more, appropriate to each project stage.

We can also help review and validate the model, the integrity of information, and progress against implementation plans.

## Our implementation approach

Planning and working with our clients is the key to a successful implementation. Transportal understands the extent and complexity of adopting a new technology and supports its implementation.

Whilst all implementations subtly differ, there are core activities, each with a documented output, that Transportal will undertake, as detailed below.

## Planning

The initial task is to engage key management to identify a project sponsor, a key project board member and a dedicated Project Manager. These will form the dedicated Transportal Project Manager's team to report to and focus on in all communications. Transportal will discuss the high-level planning of the project with this team and define the necessary steps, key business, delivery, financial gates, and project phasing.

Ensuring that the project has this high-level sponsorship, and everyone is fully committed and aligned, this team is the framework for success.

*The planning stage output will be an agreed-upon plan with a defined project team.*

## Requirements

Transportal will use its expertise and look to the project team for guidance to form a structured and varied stakeholder list. Stakeholder input via workshops is one of the key areas that our consultants will use to gather the broad and detailed requirements.

*The requirements will be filtered, structured, and documented.*

## Specification

Simply taking a list of requirements is insufficient to implement this type of technology. Transportal will take the detailed requirements, categorise them into Business, Technical, User, and Integration, and document them accordingly.

These categorised requirements will be presented to the project team, typically resulting in a significant amount of healthy discussion and iterations. Transportal will be responsible for highlighting any constraints and risks to ensure that the final requirements are achievable.

*The output will be a detailed project scope that is agreed upon.*

## Planning

Transportal will break down the detailed scope into individual tasks and allocate the appropriate skills and resources.

Technical input will be required to balance implementation, configuration, integration, and development resources and identify dependencies and constraints.

From a project management perspective, an Implementation Plan will be presented to the team. As with gathering, documenting, and agreeing on the specification, Transportal expects much discussion to reach a finalised plan.

*The output will be an agreed-upon Implementation Plan.*

## Business Change

Transportal will work closely with the project team to understand the cultural landscape and develop suitable collateral to win the hearts and minds of all connected parties, emphasising the value of the project not only to the business but to employees and customers alike. Clear, concise, and regular communication will be vital in building confidence.

*The output will be a comprehensive internal communications plan.*

## Rollout

As part of the detailed implementation plan, each activity and its associated resources and responsibilities will be documented and provide the framework for a successful rollout. Tight project management and communication with the team is essential, as are the softer skills of a close working partnership.

Delivering projects on time and within budget is of paramount focus to Transportal, but however well planned and prepared, there will always be an unexpected challenge. We recognise the importance of proactively raising concerns, risks, and challenges early.

*The output is the execution of the Implementation Plan.*

## Review

We have always prided ourselves on providing the highest quality technology and services and are always looking for constant improvement in all aspects of the business.

Setting high standards, being self-critical, and partnering with like-minded organisations are the keys to exceeding our goals. As part of our engagement, we will include regular review meetings, clear KPIs, and measurements for ourselves and you.

At agreed milestones, the relevant project managers will engage in an open and honest review and discuss lessons learned for continuous improvement in subsequent stages.

*The output will be an agreed-upon Implementation Plan.*

## Account Management

Our Account Management includes regular meetings to monitor and review your ongoing licence and project requirements. By maintaining communications with your key personnel as points of contact, we can help you stay up to date with all matters relating to your work and keep you informed on a day-to-day basis.

## Customer Service Desk

We will help you monitor your users' Customer Service Desk (CSD) tickets, which may help identify additional training requirements or project process feedback.

## Consultancy Services

Engaging with our consultancy services ensures you're making the best use of our tools. This can be especially useful for upcoming projects and proposals, providing a timely rollout of training and functional reviews that can capture key details ready for rollout.

## RFC Submission

We are keen to ensure our tools meet specific functional requirements you may have and work closely with you to identify any areas for updates or additions via Requests for Change. The project team will develop a functional specification for agreement and submission based on an initial discussion.

We will guide you on additional budgets, submission costs, timescale, and rollout schedules.

During the rollout phase, project teams will have an opportunity to review and test the new features on our UAT test servers before finally being made available on the live servers.

## API Integration

Transportal provides guidance on using our API, enabling project teams to integrate with our services and enhance their project data capabilities.

Our API is simple to use, from simple data queries that provide data feeds to other applications or dashboards to middleware provision, giving true integration to 3rd party systems. It extends the value of the project data.

## Training

We can offer bespoke training depending on your project needs, but we also run a series of standard training sessions for users. All our training programs are split into modules to cover sections of the CDE and are aimed at user roles and workflows.

### DMS Training (Admin)

Providing details of the DMS, including Project Configuration and Workflow definitions for project admins, this course will allow your users to start, define and run a project within our CDE.

### DMS Training (Full User and End User)

We offer two varieties of user training aimed at users of the DMS.

Full User training is provided to those authoritative members of the project team. These roles can support the supply chain and are versed in the importance of following CDE principles for maximum value and delivery benefit of the project.

End User training is provided to those interacting with the CDE as part of their engagement with the project. We can help define Guidance and Instruction Notes and documentation on the workflow practices these users are instructed to follow.

### Digital Forms (Admin)

Provides complete training in the configuration and rollout of our digital forms. By encapsulating your workflows into digital forms, your project users can concentrate on the tasks at hand while you ensure that all appropriate records are collected.

### Digital Forms (End User)

Using our digital forms is a simple process for most users, and this course helps them work with the forms they need where they need them. There are methods to work with forms on the web, with tools for managing, completing, and monitoring them. Our mobile application enables the capture of the data out in the field, bringing site teams into the digital workspace.

# What We Do

## Consultancy Services

Determining your specific needs and supporting your outcomes. We provide consultancy services to help you overcome your challenges.



## Studio Services

Providing high end 3D visualisation, animation, and motion graphics to ensure your bids stand out from the crowd and your stakeholders are always engaged.

Supporting your successful project delivery with an integrated suite of products and a team with years of experience in the construction industry.

Cloud-based CDE for round the clock access. Enables you to gather, enhance and manage live, context sensitive information in an access-controlled environment, across your project and supply chain.

## Document Management

The workspace to provide effective team collaboration for your models and documentation, wherever they're located, using ISO19650 process flows.



## Asset Management

Compile all your digital asset data collected from models and stored within the CDE, so you understand what's happening.

## Digital Forms

Enable your site teams to communicate effectively and save time, by completing project information on web or mobile forms.



# Technology that enables smart digital construction



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