![Tableau from Salesforce logo]

Convince
your boss
Tableau is right
for your team

You've found an analytics platform you love—
here's how to convince your boss to buy it.

Contents

You know that investing in Tableau makes sense. Decision-makers have a bigger appetite for data, and the more they see, the more they want. They might not understand, though, how much more value you could provide if you didn't need to spend so much time wrangling insights from complicated and maybe even outdated tools.

Now is the time to make the case for Tableau. Whether your boss is already thinking about buying it or if they need a nudge, they need to hear from you.

Need a little help getting started? This guide covers the top five benefits managers want out of their analytics platforms–and how Tableau delivers those benefits.

CHAPTER 01

They want to make better decisions based on data

" Before Tableau, we'd present a static report to execs, and after that, they'd send emails with a dozen follow-up questions. Now, the execs can poke around in the report, get insights, and answer questions in real time."

**DANA GREENLAW
ANALYTICS MANAGER, SPECIALIZED**

CHAPTER 01

As the business world bends toward data-driven decision-making, people at all levels are looking for ways to make data more readily available and simpler to understand.

Tableau makes data exploration easy for everyone, regardless of technical expertise. Explore your data with an intuitive interface, employ AI-driven statistical modeling with a click, ask questions in your own words, and get started right away with accelerators.

With Tableau, you can:

✓ **Explore data intuitively**
Visual best practices like drag-and-drop controls are built in, providing limitless visualization without stopping the flow of analysis

✓ **Use AI-driven statistical modeling**
Transparent AI is built into the platform and shows how predictions and insights are surfaced and why they are relevant

✓ **Ask analytical questions using natural language**
Ask Data is a simple point-and-click guided experience for asking analytical questions in your words

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tableau ┼┼ exchange

Tableau Exchange is our hub for resources built by Tableau and third parties to help you get from data to insights more quickly.

The Exchange offers:

• Accelerators: Pre-built dashboards and workbooks spanning a full suite of use cases you can use right away, regardless of technical skill

• Connectors: More than 100 connectors for accessing additional databases and applications

• Dashboard extensions: APIs that add unique functionality to dashboards or integrate them with web applications

Tableau Tip

Get vizzing! Use the Tableau free trial to make a powerful, interactive visualization and share it with your boss and colleagues. You can show them how powerful Tableau is in the context of your business and how quickly you can provide deeper insights.

Did your trial expire before you had time to create one? Find an example from our showcase or Tableau Public.

You'll accomplish these things:

Make it real.
Show what you can do with Tableau in the context of your business. Bonus: Your boss can use your viz to make the case to their boss for funding.

Show time to value.
One of the first questions buyers ask is how long it takes to see results. Show them how much more quickly you can do your job and provide deeper insights.

Inspire your colleagues.
Demo the demo! Walk them through how you used the trial and encourage them to sign up. The more on board your team is, the better case you can make for buying Tableau.

CHAPTER 02

They want to share knowledge across your organization

" Before we had myDashboard, powered by Tableau Embedded Analytics, people in the organization relied on paper copies or disparate reports. Now we have details available that we didn't have before, and we're able to get creative and strategic with how we deliver that data to our agents and employees."

SUSAN MALACK
MANAGER OF SALES INSIGHTS & ANALYTICS AT AMFAM

CHAPTER 02

Tableau is built for collaboration. Team members are able to share data and workbooks, collaborate within the app, publish and share dashboards in real time, and distribute updated reports through our subscription feature.

Within the Tableau platform, you can:

✓ **Collaborate effectively**
Use web authoring to publish your workbooks to Tableau Server or Tableau Cloud with web edit rights. Everyone with permissions can make changes and collaborate within the single workbook.

✓ **Share insights quickly**
Share within the app itself and send an in-app notification, copy and send a link via email or text, or copy code and embed it in a webpage.

✓ **Stay on top of your data**
Use the subscription feature to send out PDFs of a dashboard or view at standard intervals–say, daily or weekly–without having to log in.

slack

With Tableau for Slack, you can:

- Get Tableau @mention notifications.

- See Tableau alerts within your Slack workflow. You can jump into the dashboard from Slack, comment within Tableau for Slack, or send a Slack message to the commenter.

- Notify stakeholders in real time You can set an alert to notify business users at the moment your data meets a key threshold.

CHAPTER 03

They want to create a Data Culture

" My a-ha moment that we reached a strong Data Culture was when I saw three meetings with a Tableau dashboard on screen in the same hallway. There was one source of truth in our Tableau ecosystem, and everyone was speaking the same language."

JEFF DUNN
CHIEF STRATEGY OFFICER, SEATTLE SEAHAWKS

CHAPTER 03

Data Culture is the realization of Tableau's mission to help everyone make better decisions with data. It's not a product or a feature, but a true cultural change that weaves data into the operations, mindset, and identity of an organization.

READ THE WHITEPAPER

To help Tableau customers along their Data Culture journey, we curated recommendations from thousands of customers into these tools:

✓ **Tableau Blueprint**
The most comprehensive methodology for building a data-driven organization

✓ **Data Culture Playbook**
Actionable guidance for business leaders who want to establish the foundational behaviors and mindsets needed to build a resilient, data-driven organization

✓ **Data Literacy for All**
A free eLearning program that provides data skills fundamentals, regardless of skill level

Organizations with Data Cultures are:
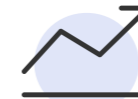
4.6x more likely
to use data in
major decisions

6.3x more likely
to use data in
daily meetings

8.1x more likely
to use data in their
approach to work

10.7x more likely
to use data in
support proposals

Source: How Data Culture Fuels Business Value in Data-Driven Organizations, May 2021,

Tableau Tip

Share your trial experience with your boss and colleagues.

Be prepared to answer these questions:

- What was your trial experience like?

- Was it easy to learn?

- Were you able to find the support and resources you needed?

- Do you think your colleagues will want to use it?

- Do you think it will help them make smarter decisions?

CHAPTER 04

They want to get value for their money

" Our IT team saves around 15 hours per week now," said Jean. "We don't have to deal with server errors or failures, so there's less time spent monitoring and worrying about resource capacity."

NELSON JEAN
DATA SUCCESS PROGRAM MANAGER AT F5

CHAPTER 04

Your boss and IT department might be tempted to choose a product that came as part of a software bundle. But not all analytics platforms are created equal, and they certainly aren't all created for data transformation. When you prioritize value, it's easy to see how Tableau stands out.

The end goal of your analysis is not a dashboard–it's a better understanding of your data. In Tableau, you can dig deeper into an outlier or iterate on your discovery without breaking the flow of analysis.

Our customers have reported these business benefits from using Tableau:

✓ Accelerated speed for evaluating and making decisions

✓ Increased efficiency of business operations

✓ Avoided cost of maintaining older systems

And these cultural benefits:

✓ Supported ongoing journey to a data-driven company culture

✓ Anticipated needs and tailored programs to customers

✓ Enabled collaboration and continued innovation in data analysis

Tableau pays for itself—and then some
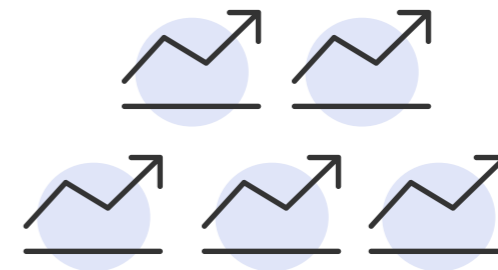
5x
Return on Investment

1 year
Time it takes for Tableau to pay for itself

Source: Forrester Consulting Total Economic Impact Study commissioned by Tableau

CHAPTER 04

Pricing for data people

People need access to data to do their jobs better, but their relationship to data can differ. Tableau's role-based licenses allow you to deploy data broadly across your organization to users of all skill levels.

Tableau Roles

Tableau Creators

Creators typically hold the analyst title. They clean and prep data, conduct complex analysis, and publish visualizations and data sources to their organization. They use Tableau to streamline mundane data prep tasks so they can surface deeper insights.

Tableau Explorers

Explorers are decision-makers who are comfortable with data. They use data analysis to make better business decisions and are often the driving force behind data transformation.

Tableau Viewers

Viewers use data to inform and improve the decisions they make, but don't extract the data themselves. They can be anyone from team members who need data to perform daily tasks to the C-suite.

LEARN HOW TO DECIDE WHICH LICENSES ARE RIGHT FOR YOUR ORGANIZATION

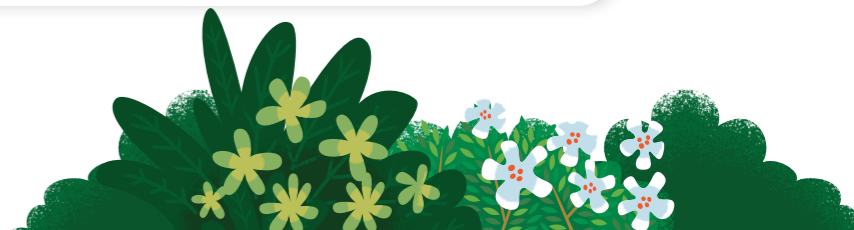## Tableau Tip

Show them the money! Use these models to estimate the ROI if your team adopts Tableau.

Total cost of ownership (TCO)

Calculate the total cost of owning a business intelligence solution.

GO TO THE MODEL

Worker productivity

Compare gains in worker productivity achieved with different solutions and use the cost of labor to compute a return on your investment.

GO TO THE MODEL

Expected impact

Quantify the value gained from improved decision-making with a more informed workforce.

GO TO THE MODEL

CHAPTER 05

They want to help everyone on your team succeed

" As long as we listen to the business groups, we can build new kinds of tools that give them everything at their fingertips to make insightful decisions."

SUNIT BHULESHKAR
DIRECTOR OF BI & ANALYTICS AT CARTER'S

CHAPTER 05

As you move from legacy tools to new ones and downshift from existing skill sets to more modern practices, don't forget the people behind the titles. With the right training and support, you can make disruption feel more like evolution.

Training

A comprehensive catalog of training options for people of all skill levels and across business functions

- Try before you buy learning paths by role
- Free training videos
- Tableau eLearning
- Instructor-led training
- Tableau certification
- Learn more about Tableau training options

Tableau Success Connector

Free, one-hour, role-specific question-and-answer sessions with a Tableau Success Guide

Tableau Support and Services

Comprehensive, searchable technical support

Tableau Professional Services

Expert Tableau consulting services with a wide array of offerings, including advisory, technical services, and change management

Learning paths by role

Author

Data Scientist

Site Admin

Data Steward

Analyst

Consumer

CHAPTER 05

Reclaim your team's time with self-service data prep.

With Tableau Prep, you can:

✓ **Keep data fresh automatically**
Schedule your flows to run when you need them. Automate the tasks of running flows and create a repeatable process, so there's consistency in the delivery of prepared data.
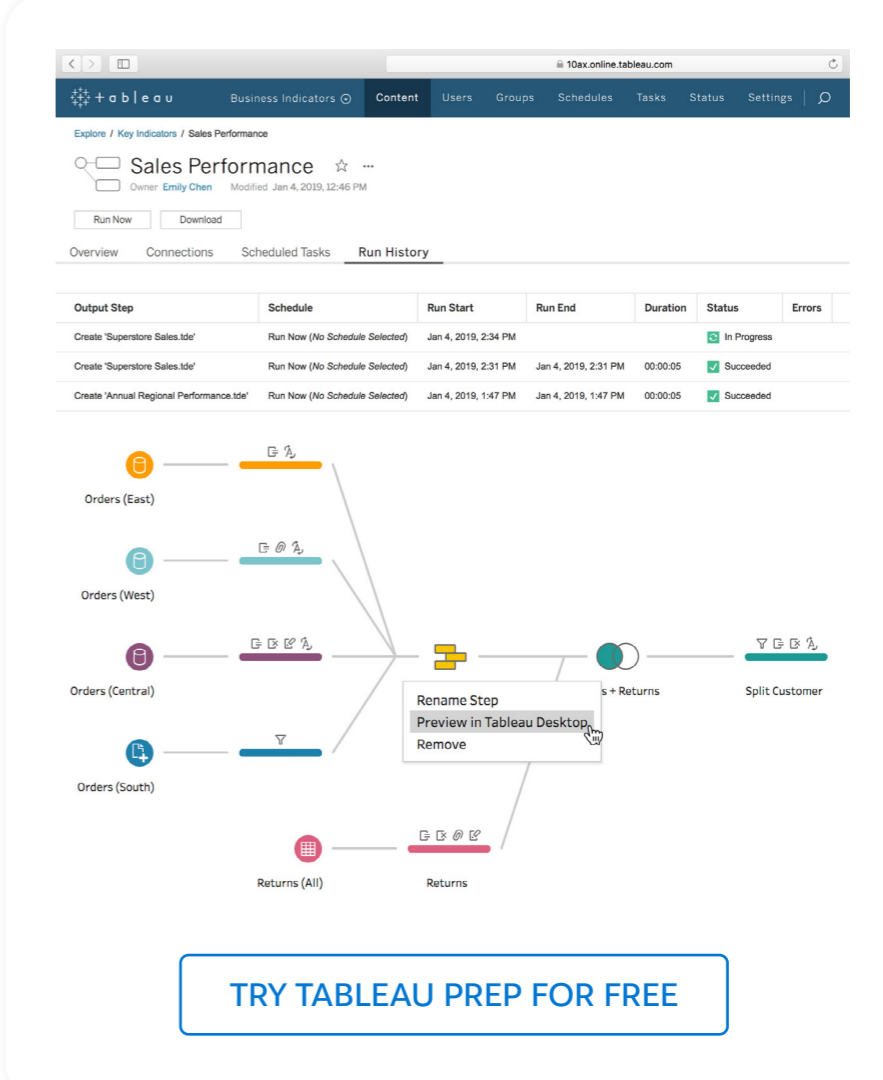
✓ **Stay informed with alerts and run history**
See a historical view of your flows' run history, including successful or failed runs at a glance. Keep track of the quality of your prep flows with out-of-the-box alerts if a flow fails.

✓ **Create a governed prep environment**
Build rules and permissions around data sharing and refreshes. Leverage existing permissions and infrastructure in Tableau Server or Tableau Cloud to control who can publish, view, and run flows.

✓ **Increase data discoverability**
Use simple management capabilities, including keyword tagging, moving flows between projects, and setting user permissions, to help users across the organization find relevant, prepared data.

TRY TABLEAU PREP FOR FREE

What's next?

It's time to persuade your boss! Tableau helps people and organizations become more data-driven with the most beloved modern analytics platform in the world. Create your viz. Use the ROI calculators. Share your trial experience with your teammates and suggest they try Tableau out, too.

Now, get out there and make your case!
Want someone at Tableau to help with the conversation?

CONTACT US

tableau

from ☁ Salesforce

Gartner	**FORRESTER**®	**PC** EDITORS' CHOICE
11 years a leader in Gartner's BI & Analytics Magic Quadrant	Forrester Wave BI Report Leader	Best Self-Service BI Tool from PC Mag

A Salesforce Company, Tableau helps people see and understand data. As the world's leading analytics platform, Tableau offers visual analytics with powerful AI, data management and collaboration. From individuals to organizations of all sizes, customers around the world love using Tableau's advanced analytics to fuel impactful, data-driven decisions.

For more information, please visit www.tableau.com.