How Salesforce Uses Tableau for Marketing Analytics

Improve performance and efficiency across marketing
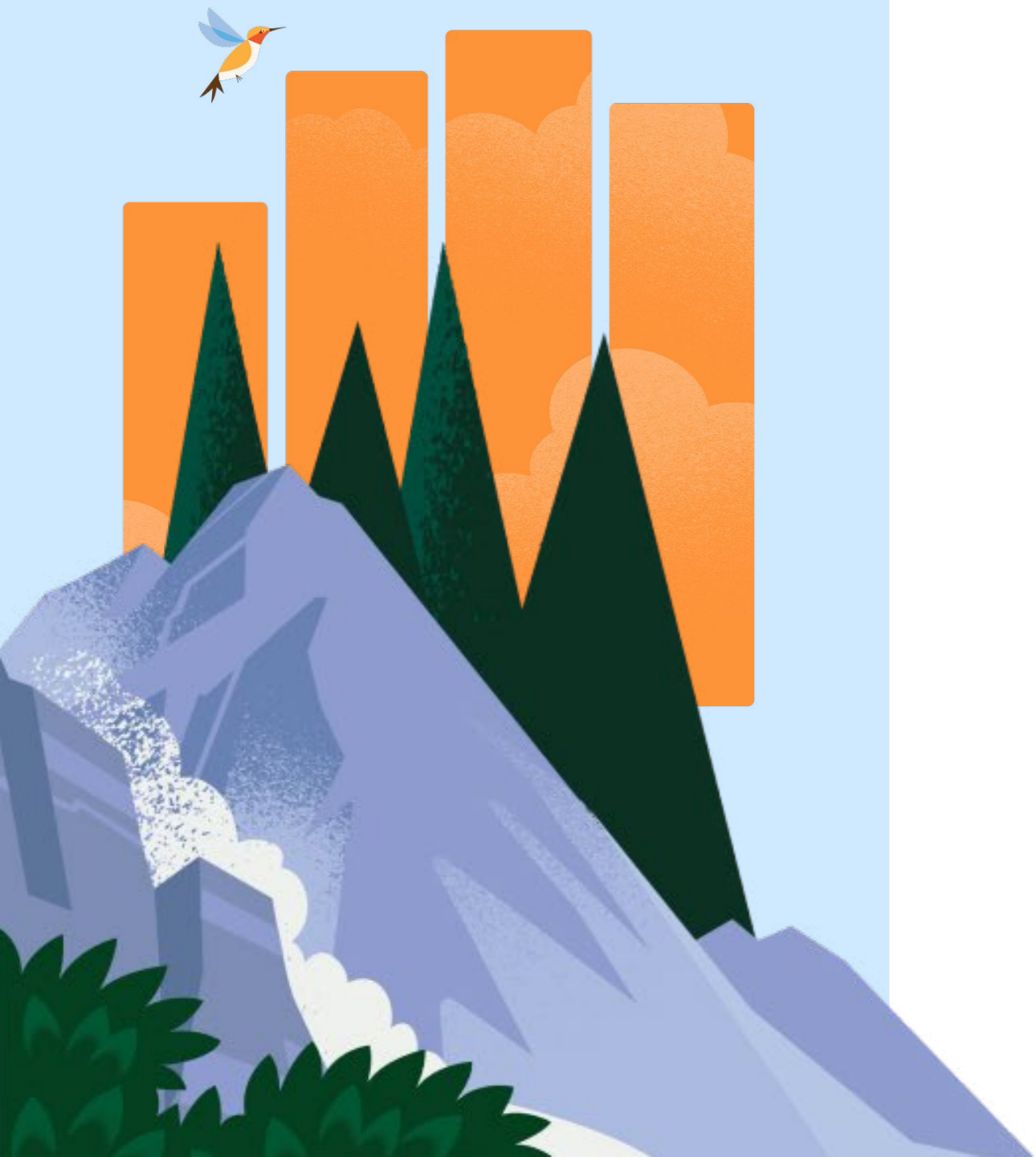
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Introduction

There are countless companies that produce incredible products and services, but without effective marketing, it can be an uphill battle to grow a customer base and increase profitability. To add to this, unexpected challenges in recent years have put marketing departments under even greater scrutiny and strain. With few indications that changes will slow, marketing teams have been forced to cut budgets, prove the ROI of every channel and campaign, and be even more creative with their tactics, advertising, and content.

Given these increasing headwinds, companies are asked to do more with less. Now is the time to find greater operational and cost efficiencies in every campaign, media plan, social channel, and email nurture. Thankfully, organizations can **use data to make good decisions quickly and take action.**

Data has never been more relevant because it helps us solve critical challenges and make good decisions. But how do organizations—and marketing teams—access, analyze, and understand their marketing data to inform their decisions?

With Tableau, marketing teams can connect disparate data sources, track KPIs, and quickly deliver insightful reports to leaders and stakeholders. The platform helps marketing professionals optimize their impact, maximize and reduce spend, collaborate more closely, and solve common challenges around siloed data, cleaning up messy data, surfacing trends, and much more.
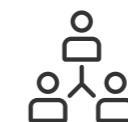
Read on to learn how Salesforce, our customers, and our partners use the Tableau platform for marketing analytics. This guide will help your marketing teams:
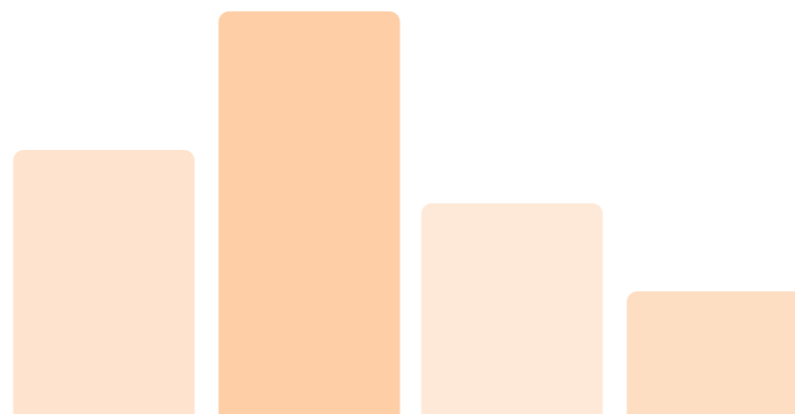
Deliver speed to campaign and audience insights for better decision making
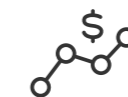
Optimize your impact to grow performance, leads, and conversions

Foster collaboration to break down silos and scale efforts

Deliver speed to campaign and audience insights for better decision making

Customer needs and trends are often in flux. It's the responsibility of marketers to recognize these needs and trends, and to manage their campaigns by making adjustments to things like digital spending and audience targeting. Having real-time data on campaign performance and audience insights is critical to the success of most marketing efforts, so organizations need to invest in tools and processes that are easy to use and scalable, help teams be agile, and drive efficiency. With recent global crises and economic uncertainty, being able to make good decisions with relevant insights is more important than ever.

So how do marketers get a comprehensive understanding of their customers and prospects, to make every dollar of their marketing budget count? They begin by connecting all of their disparate data sources and have one source of real-time customer truth with **Salesforce Genie**, a customer graph built from billions of data points. Salesforce Genie has built-in connectors that bring in data from all of your data sources—mobile, web, APIs, and even historical data from proprietary data lakes—to create a 360-degree view of your data that can be activated for real-time personalization, workflows, analytics, and more.

Powered by this customer truth built on Genie, Tableau and CRM Analytics help unlock analytics everywhere for everyone. You can turn real-time insights into customer magic with Tableau Genie, which helps you automate analysis on all of your data, and have your entire organization collaborating and acting on real-time analytics. AI insights powered by **Tableau Genie** help you and your organization reach insights 29% faster, so that you can make smarter decisions.

To deliver speed to campaign and audience insights for better, faster decision making, use a dashboard like this **Website Performance visualization** by ChannelMix to report on website engagement, activity, and performance. You can see how your audience engages with content on your website, what they're downloading, and which events drive the most conversions.
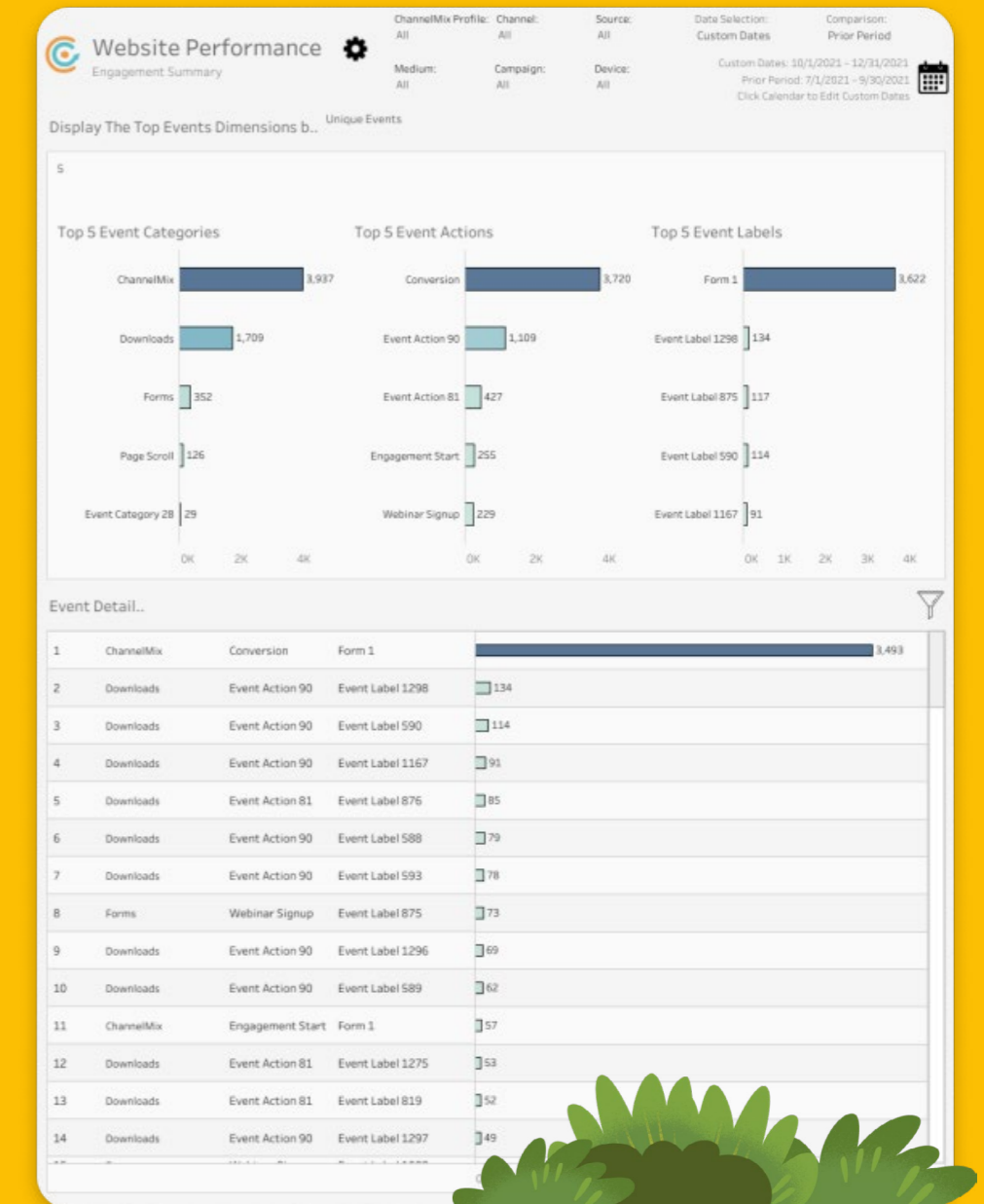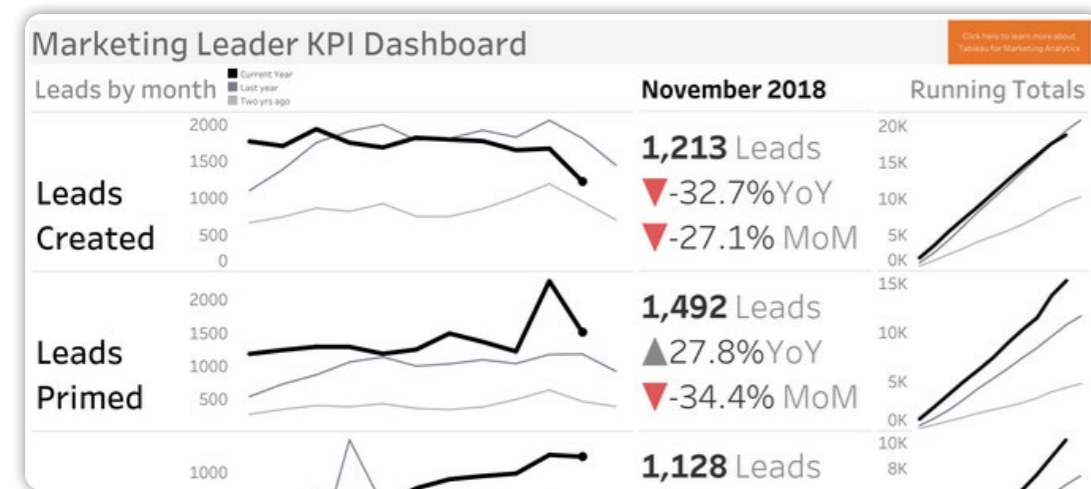
The Website Performance Dashboard gives marketers a view of how their audience is engaging with their website, what they're downloading, and what is driving conversions.

Explore the dashboard →

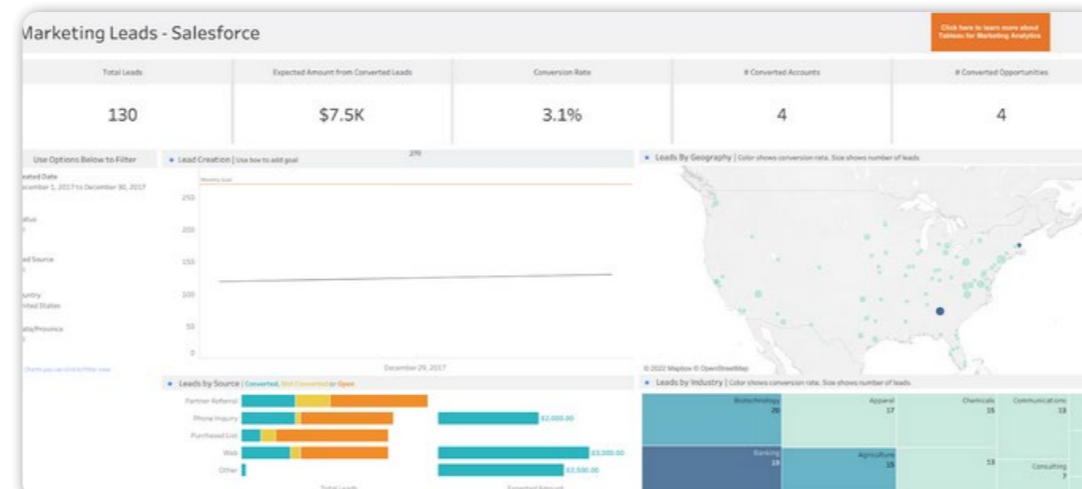# Optimize your impact to grow performance, leads, and conversions

With the amount of change facing marketing departments today, pressure to make every decision impactful continues to grow. In order to optimize your impact and budgets to grow performance, pipe, and conversions, start by establishing and tracking baselines and KPIs to fuel efficiencies and results. Try building a visualization like the **Marketing Leader KPI Dashboard**; having all of this information in one place helps teams quickly report back to leaders on lead creation, priming, and qualification.

To have your entire marketing department working from a single source of truth, connect your lead source data and build a dashboard like the **Marketing Leads - Salesforce visualization** with total lead numbers; conversion rate; expected pipe from converted leads; and leads by source, geography, and industry. We use this visualization to help Salesforce marketers understand where leads are coming from, replicate any successes from one channel in another, and connect it to Salesforce account information.

Accelerator tip

If you're not confident about working with data or building your own dashboard from scratch, don't worry! Tableau Accelerators help you spin up marketing-specific dashboards in minutes using your own data—and at no additional cost to Tableau customers.

Get accelerators now →

The Marketing Leader KPI Dashboard shows created, primed, and qualified leads.

Explore the dashboard →

The Marketing Leads - Salesforce Dashboard provides marketing leaders with insights such as total leads, conversion rate, expected pipeline, and more.

Explore the dashboard →

Foster collaboration to break down silos and scale efforts

Without being able to see and drill down into your data by channel, you're getting an incomplete view of your performance–and missing out on potential insights to help you make incremental improvements and drive efficiency. Siloed data is one of the biggest challenges all marketers encounter, and solving it can often require reliance on engineering teams to build connections between data sources. This makes reporting back on KPIs, understanding campaign performance, and being able to quickly pivot tactics or reallocate budgets based on data nearly impossible.

So how do marketers take matters into their own hands, break down data silos, and scale efforts? You can start by using a technology-agnostic analytics solution that securely connects to all of your data, and build powerful and intuitive visualizations that invite you to dig into your data no matter where it's stored. These visualizations can easily be shared across teams to foster collaboration with teammates, ensuring everyone uses the same dashboard–a single source of truth–to report back on results.

It's likely that one of your critical campaign channels is web traffic, with KPIs for time on page, views, engaged sessions, and so on. Getting a complete view of one traffic source is easy enough, but having an analytics dashboard like the **Marketing Campaign Web Traffic Analysis Dashboard** allows you to connect and visualize all of your web traffic data by source or channel, like paid search, organic search, display, email, organic social, and more. Now you can compare results by channel and in relation to total traffic.

Use the Marketing Campaign Web Traffic Analysis Dashboard to compare channel results to total traffic.

Explore the dashboard →

Comparing results across social media channels can pose similar problems, but using a comprehensive dashboard like the **Social Media Engagement and Reach Dashboard** enables you to easily view and compare posts, impressions, likes, comments, shares, follower growth, and beyond across social channels. Dive deep into clicks by channel and individual post, tracking trends month over month, year over year.
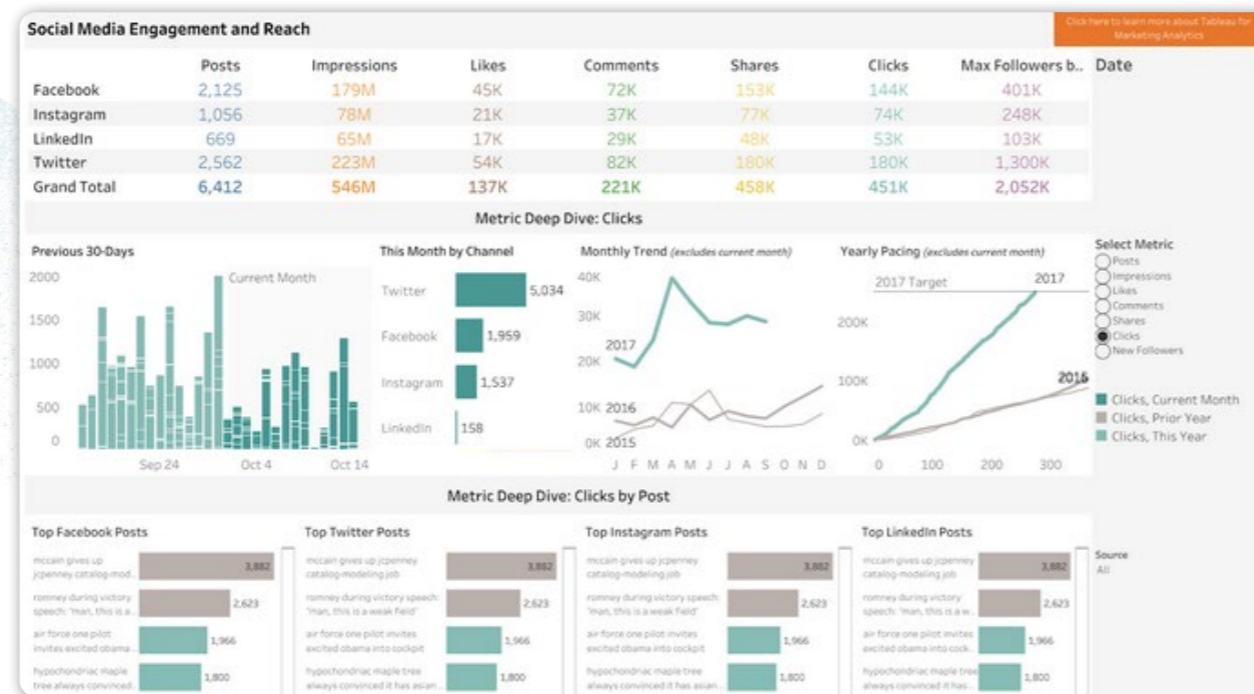
The Social Media Engagement and Reach Dashboard makes viewing performance and comparing trends across social channels fast and easy.

Explore the dashboard →

Want more marketing analytics dashboards? Check out the Tableau Public for dashboards to help you track email performance, digital campaigns, marketing activity by region, and more.

Discover more dashboards →

Customer stories | How marketing teams use Tableau

Discover how marketing teams improve speed to insight, foster collaboration, and optimize impact with Tableau.

oneflare

Oneflare leverages a single source of truth to increase sales revenue by 270%

Oneflare is an Australian start-up that connects customers to businesses across 300 categories, from plumbers and electricians to pet groomers and interior designers. Oneflare's sales team uses Tableau to combine performance data from multiple sources in a gamified view. This has helped to drive healthy competition among sales reps and contributed to an 81 percent increase in sales volume per sales rep and a 270 percent increase in revenue.

And the performance of Oneflare's marketing has also improved from being able to drill down into past campaigns to understand how they can be improved. For instance, the marketing team can now see which channels work best for promoting different categories on the Oneflare site, and also for optimizing their search engine marketing.

Tableau visualizations have been invaluable in consolidating data from multiple channels and extracting actionable insights, adding greater efficiency, productivity, and time savings. Now, it takes only minutes to visualize the performance of individual campaigns, cutting down reporting times by an average of eight hours per week. Oneflare is tapping into additional insights from Tableau to streamline the customer journey and eliminate potential points of drop-off.

Read the story →

Quandoo

Quandoo boosts sales and keeps customers happy with Tableau

Quandoo is the world's fastest-growing online platform for restaurant reservations. Founded in 2012 in Berlin, Quandoo currently has a community of more than 240 million guests and 18,000 partner restaurants in 12 countries. Its central BI team used to be inundated with everyday business questions, and bottlenecks were wasting employees' valuable time and effort that could be better spent elsewhere.

Tableau changed everything by giving the central BI team the flexibility it needs when it comes to visual analytics, connecting easily to the team's various data sources. By incorporating sophisticated access and security management, Tableau helps them maintain certain controls while allowing employees to explore for themselves.

The analytics platform helps improve Quandoo-owned apps and online platforms. Changes to their apps——like shifts in text or image size and color, or updates to menus and navigation structure——can result in considerable differences in response and conversion rates of our activities. By using Tableau to analyze the results of countless A/B tests, Quandoo can identify and deploy the most effective solutions to keep customers happy. And evaluating its online advertising spend enables Quandoo to improve its return on investment, growing cost savings by diverting money to the most effective campaigns.

Read the story →

Hello FRESH

HelloFresh boosts digital marketing campaigns, increasing conversion rates with Tableau

In the past, HelloFresh teams analyzed data in Excel, bringing in data from Google Analytics and various MySQL production databases. Due to the agile work done by the marketing team, this data had to be consistently downloaded, aggregated, and analyzed to yield up-to-date results. The daily production of daily and weekly performance reports required between one and four hours of manual work for each of HelloFresh's ten regions——and the process often did not provide the desired insights.

HelloFresh deployed the Tableau platform to centralize global performance reporting, saving 10-20 hours per day and providing regional sales and marketing teams with real-time data for nimble decision making. As a result, the HelloFresh marketing team can react to trends in customer behavior and optimize marketing campaigns on the fly, leading to better conversion rates, and improved customer loyalty.

Read the story →

Make good decisions with marketing data using Tableau

Tableau changes the way marketing teams see, understand, and take action on their data. By bringing the data marketing teams need into one place, they're able to speed up time to insight, optimize their impact, and foster collaboration with intuitive, powerful analytics. Tableau makes data a key business strength, critical in the face of uncertainty and change. If you want to turn your data into a resource to drive performance and efficiency across campaigns, improve insights for better decision making, and break down silos to scale efforts, then try Tableau for your marketing organization.

Learn more at the [Tableau Marketing Analytics solutions page](#)

Download free [Accelerators for Marketing](#)

Discover [marketing dashboards from the Tableau Community](#)

Join the [Marketing Tableau Community Forum](#)

Tableau helps people see and understand data. 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.

Tableau also integrates with Salesforce Customer 360–a customer relationship management (CRM) platform that connects the business with a shared view of customer data–giving every department access to the most powerful, comprehensive, and intuitive analytics features embedded directly into workflows. By bringing your customer data to the center of your work, you can grow your relationships with your customers and employees.