

How You Can Put Data at the Center of **Every** Decision

Good decisions start with data.

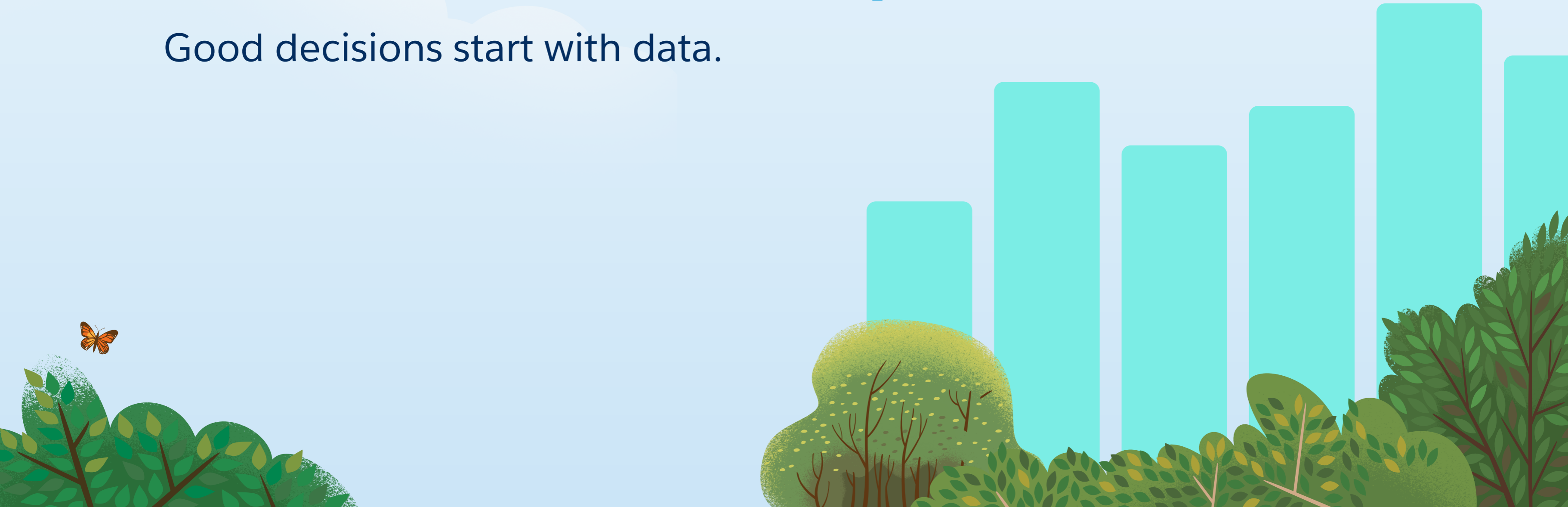


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Introduction

The data-first organization



Most of the world will make decisions by either guessing or using their gut. They will be either lucky or wrong.

– Suhail Doshi, software entrepreneur

The proverbial gut-check needs an update. What if there was a better way to make decisions?

What if you could:

- **Identify** trends and opportunities
- **Create** meaningful benchmarks
- **Predict** with greater accuracy
- **Understand** where course corrections should be made
- **Build** consensus
- **Tell** a persuasive story to your team and shareholders

The key to making better decisions is to be data-driven. When you prioritize data-first thinking across your organization and give teams what they need to be successful with data, you'll kick off a chain reaction that boosts efficiency, effectiveness, and bottom-line results.



What you will learn

This ebook will guide you through four steps you can take to elevate the quality of your decision making and drive meaningful results with data.



Become a data-driven decision maker

What's the secret sauce for building an organization that prioritizes data-driven decision making? As any leader who has embarked on this journey can tell you, it's all about changing the organizational mindset and **eliminating cultural obstacles** that interfere with how people access, consume, and collaborate with data. Critical thinking and curiosity are essential; people must feel they have agency to use data to make decisions and meaningful contributions.

Four steps to put data at the center of every decision

1. Use data to identify business objectives.
2. Use data to minimize complexity and accelerate understanding.
3. Use a data-first mindset across every team and workstream.
4. Use data to communicate more effectively.

Let's take a closer look at how to bring these ideas to life in your organization.



**Data for everyone,
everywhere**

86%

of business executives say their frontline workers need better technology-enabled insights to make good decisions in the moment.

Harvard Business Review

Step 1

Use data to identify business objectives.



I never guess. It is a capital mistake to theorize before one has data.

– Sir Arthur Conan Doyle, author of Sherlock Holmes

It's elementary, dear Watson. You need data to solve your biggest challenges, such as:

- Hitting revenue targets
- Cutting costs
- Identifying net-new revenue streams
- Targeting new customers and retaining existing ones



With the right insights, it's possible to ask complex questions and find answers.

While every business is different, these questions can be used as guidelines for developing key performance indicators (KPIs), priorities, and objectives:

What are your business goals?

How do you measure them?

Who are your key stakeholders, and how do they impact your KPIs?



Analytics in action

Huel[®]

Manufacturer and marketer of nutritionally complete food products |
100+ employees | US, UK, and Europe

Data and analytics are key to Huel's success. Huel uses Tableau to:

- **Gain** deeper customer insights, leading to more sales opportunities and increased customer lifetime value
- **Analyze** and share marketing metrics
- Quickly **identify** customer service issues
- **Find** opportunities for new products by analyzing customer behavior

Explore more

[Huel creates a thriving data culture with Tableau, inspiring business agility and revenue growth](#)



[Tableau] empowers our employees to explore the data, to confidently analyze and tackle complex business challenges, meaning everyone has a stake in driving our growth.

– Ollie Scheers, Ecommerce Director, Huel

Step 1 takeaways

- Data is foundational to good planning and success.
- Data analytics make it possible to cut through the noise of “too much data” and discover insights that create new opportunities.



Step 2

Use data to minimize complexity and accelerate understanding.

Next ensure that your people have the data they need to implement the broader vision of your organization. Data residing in siloes is not a viable solution when decisions need to be made quickly, across every workstream, every day.

Aligning on a single source of truth—one view accessible by everyone—not only reduces complexity and aids understanding, it helps your teams to be more agile and collaborative.



Knowledge has become the key economic resource and the dominant, if not the only, source of competitive advantage.

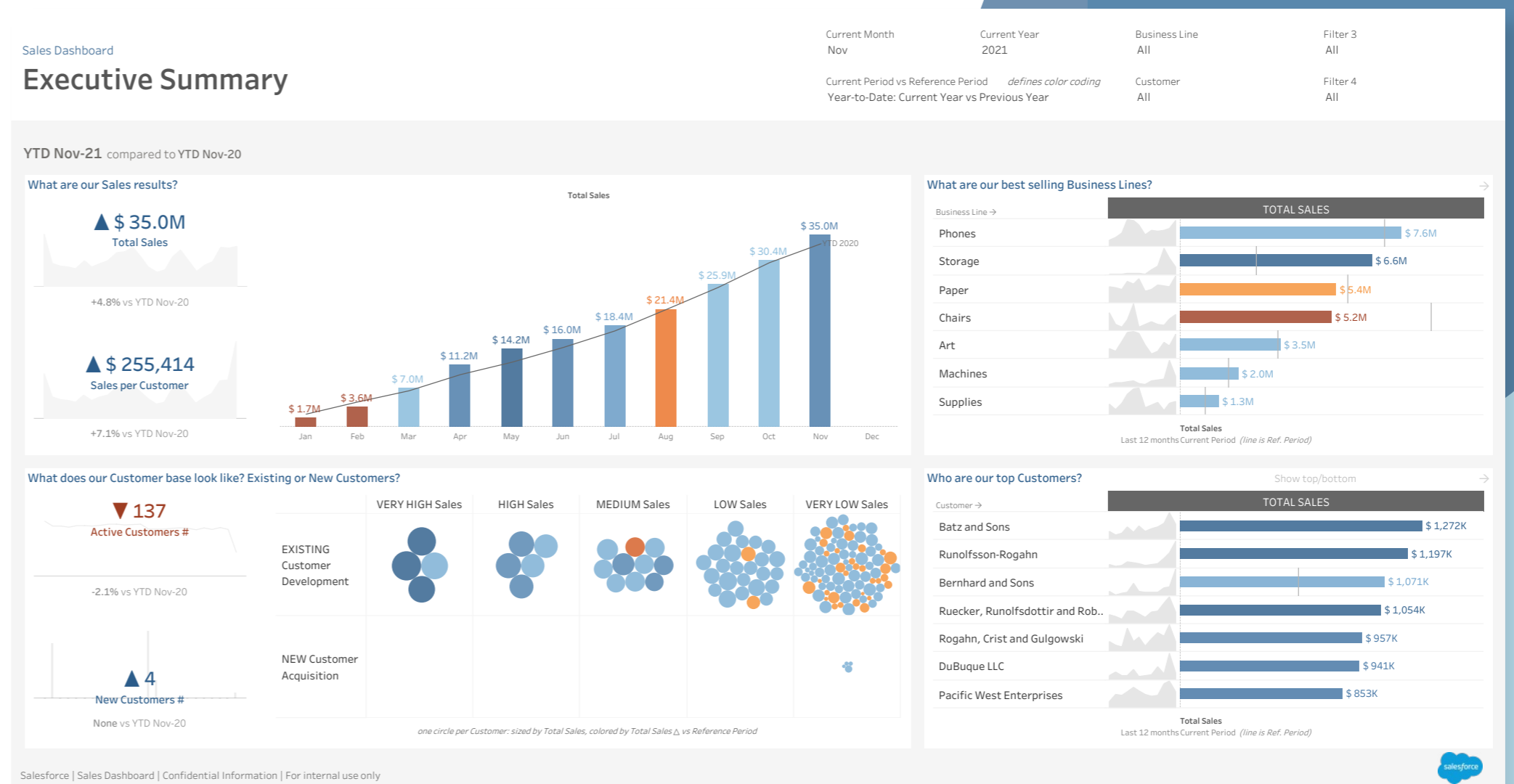
– Peter F. Drucker, management consultant, educator, and author



Accelerate impact

For example, visual data dashboards (like this Sales Accelerator) can help sales teams better understand and monitor sales results across customers or products and measure sales performance over time. Using this dashboard, sales leaders can answer key business questions like:

- What are our sales results?
- Are we on track compared to last year?
- Are we on track to meet our target?
- Which products drive the most sales?
- Who are our top customers?
- How many active customers do we have?



Source: [Tableau Accelerator: Sales](#)

Analytics in action



Fortune 200 financial services company |
35K+ employees | 16,000 Tableau users

The ability to make meaningful decisions with data is core to how the Charles Schwab Corporation does business. Schwab uses Tableau to:

- **Analyze** branch-level contributions to overall company results by consolidating reporting
- **Enable** financial consultants to track performance and customize client offerings
- **Provide** branch managers with detailed analyses they can use to help their consultants better serve clients

Explore more

[Charles Schwab equips more than 16,000 employees with Tableau](#)



Without Tableau, we would be stuck analyzing enormous amounts of data in spreadsheets. Instead, we create dashboards that provide clear actionable insights, and that drive the business forward.

– Donald Lay, Senior Business Intelligence Manager,
Charles Schwab



Step 2 takeaways

- Promote an organizational mindset that prioritizes data-first thinking and allows individuals to share and explore data and collaborate with others.
- Activate the potential of data in your organization by activating your people.

Step 3

Use a data-first mindset across every team and workstream.

Put data in the hands of your people

Data democratization is powerful. When teams can align around data, they share a common understanding, can better adapt to changing business needs, and find opportunities for innovation. The complexity typically associated with decision-making is minimized, and speed to insight is increased. It's easier for teams to move forward together, knowing that they are working with the same “playbook”. And, as this data muscle grows, the importance of data gets hard-wired into the business—creating **‘organizational wisdom’** and a **data culture** where data-driven decision making is fundamental to everyone’s role.

Move from data to insights to action



Unlock your data

- Reliable, up-to-date data
- Alignment with security, governance, and compliance requirements



Empower everyone, everywhere

- Organization-wide access to trusted data and dashboards
- Better, faster decision making



Act on your data

- Data-driven insights in the flow of work
- Data as foundation for all decisions and strategies

Image inspired by [Data-driven companies outperform their peers](#) (CIO)

Share that data!

Data sharing is a natural, and necessary, part of your digital transformation journey. The Gartner Chief Data Officer Survey, as noted in [The Case For Building a Data-Sharing Culture In Your Company](#), predicts that organizations that promote data sharing will outperform their peers on most business value metrics as soon as 2023.

Data sharing enhances decision-making in areas such as:

- Customer experience
- Revenue generation
- Cost optimization
- Risk mitigation
- Value creation



By the numbers

Achieving a data-driven culture was one of the **top three** most important business intelligence trends in 2022.

[BI-Survey](#)

But:

91.9% of executives cite cultural obstacles as the greatest barrier to becoming data driven.

[Harvard Business Review](#)

Because cultural change is a long-tail game, success won't happen overnight—but it will happen when goals and expectations are clear, learning milestones are set, and data-first thinking is an organizational norm.

Analytics in action



Global leader in cloud communications |
2,000+ employees; 100K customers

Thanks to siloed data sets and manual processes due to a series of major acquisitions and new technologies, Vonage once struggled to get a complete customer view. Vonage uses Salesforce to:

- **Create** a centralized communications hub, or digital HQ, with [Slack](#) to unify data, help teams easily access information, and provide sales reps with automated answers to improve customer service
- **Link** data from multiple systems and teams with [MuleSoft](#), enabling a complete view of the customer and relationship building
- **Visualize** complex data across teams by consolidating data from [Tableau](#) into the digital HQ, giving execs a single dashboard to show updates, strategies, and decisions

Explore more

[From 4 days to 4 minutes—how Vonage uses automation to respond faster](#)



The best way to scale a business is to let the data drive decision-making. Data is truth, right? It just doesn't lie.

– Tara Zaleski, Senior Director, Business Services, Vonage

Step 3 takeaway

Putting data at the center of your business strategy and decision-making processes yields measurable results, but it requires buy-in from all stakeholders—and a commitment to nurturing a data culture.

Step 4

Use data to communicate more effectively.



Data visualizations aren't intended mainly to convey messages that are predefined by their designers. Instead they are often conceived as tools that let people extract their own conclusions from the data.

– Alberto Cairo, [The Truthful Art: Data, Charts, and Maps for Communication](#)

Telling stories with data

So far, we've learned that data is table stakes for accelerating good decision making, and that promoting a data-first mindset across your organization is good business. But the way you communicate your data plays a key role in how your data initiative will scale and succeed. To do this, you need data visualizations.

It's been said

The use of visual language brings about 21% more consensus in decision-making.

[American Management Association](#)

The best data visualizations and dashboards are interactive, immersive, and deliver deeper levels of understanding than any spreadsheet or static infographic ever could. When you can show—not just tell—your story, you can make quicker, better decisions.

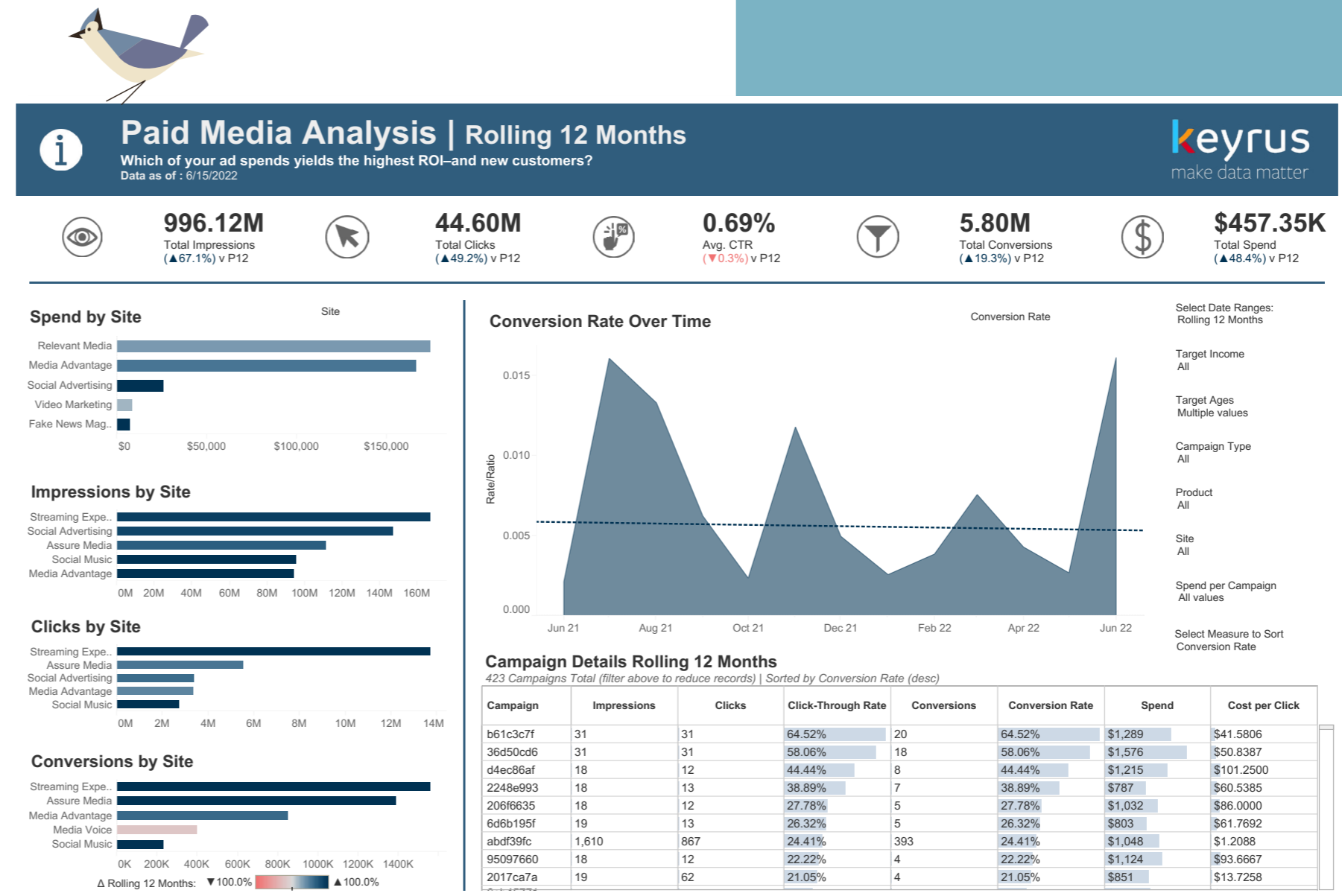
Bottom line? Data storytelling, using the power of data visualizations, is fundamental for communicating data insights to your audiences.

See and understand data with Tableau

In the past, data visualizations required specialized expertise that was typically beyond the average business persons' skills, limiting them to charting tools in spreadsheet applications, or one-off visuals requiring a designer. With Tableau, however, business users can create charts, graphs, maps, and more using an intuitive interface. Tableau offers various [educational offerings and certifications](#) from novice to expert to get you started.

Additionally, you can get to data-driven insights faster with ready-to-use, customizable dashboards for any line of business from [Tableau Accelerators](#).

Marketing leaders can use visual dashboards like this [Paid Media Analysis Accelerator](#) to see and understand campaign results and ROI to answer key questions around spend, performance, conversions, and more.



Step 4 takeaway

Data visualizations are part of the data literacy vocabulary and play a significant role in supporting data-driven decisions.

The data imperative is now

Automating processes and systems? Modernizing your technology stack? Moving to the cloud? Digital transformation means all of those things, but for future-facing businesses like yours, no digital transformation is complete without a data-driven approach to decision making.

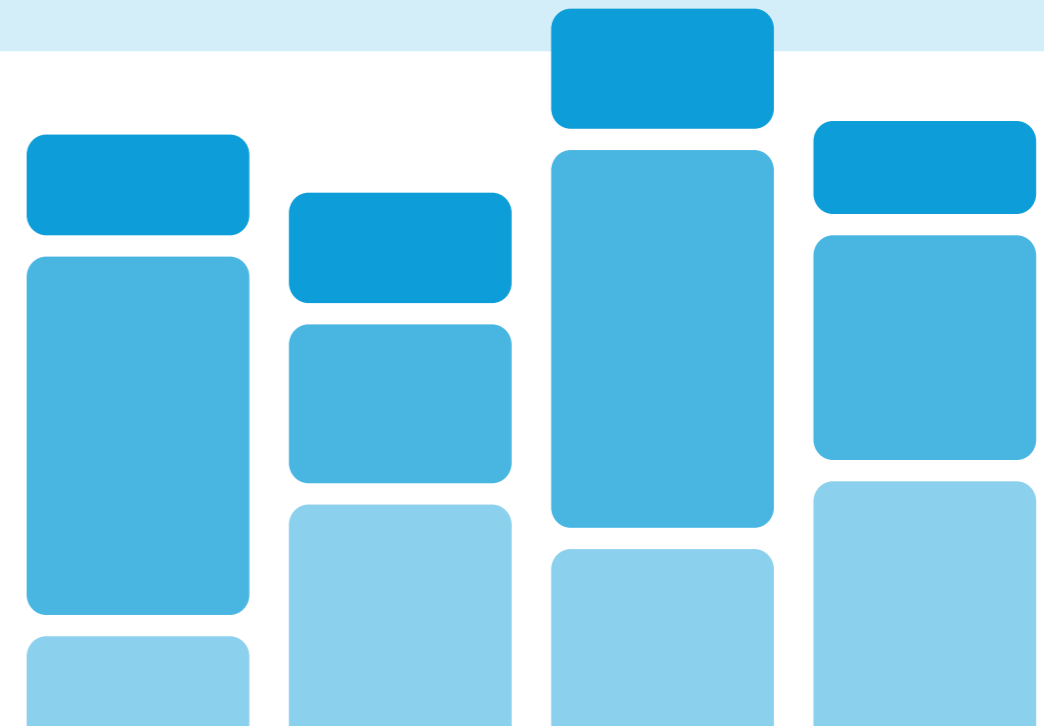
Your data analytics strategy and technology platform are the cornerstones of your digital transformation. But any digital transformation that's treated like a technology project is destined to fail. While your tech stack and analytics platform are critical, in the long run, it's the way your organization elevates mindset over machines, and creates an environment where everyone can realize their full potential as data-driven decision makers.

Next steps

Learn more about why good decisions start with data: tableau.com/tableau-business-leaders.

Did you know?

According to Gartner, nearly 97 percent of data sits unused by organizations—a finding that's shocking yet unsurprising. Digital transformation necessitates a new approach to data that acknowledges the urgency of having a distinct strategy for data analytics.





About Tableau

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.

