



# 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.



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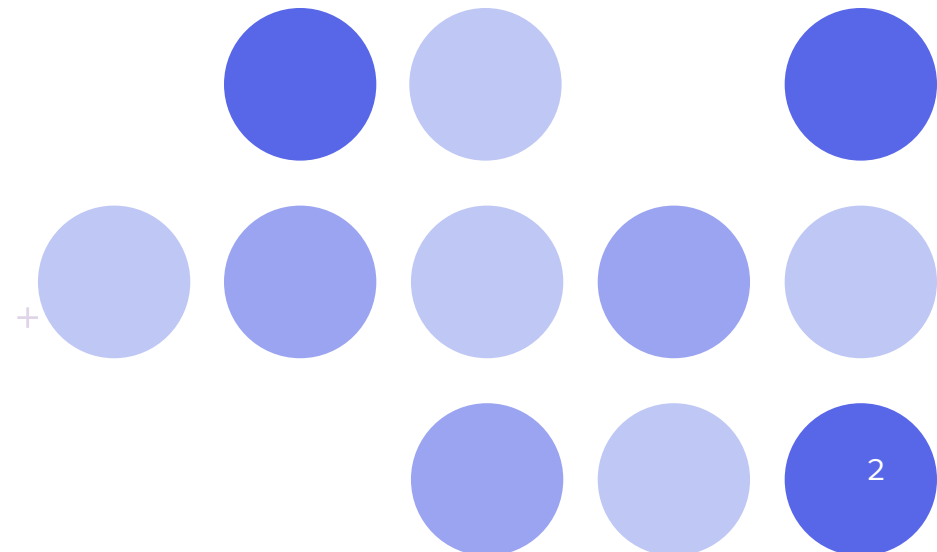
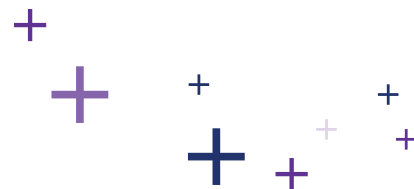
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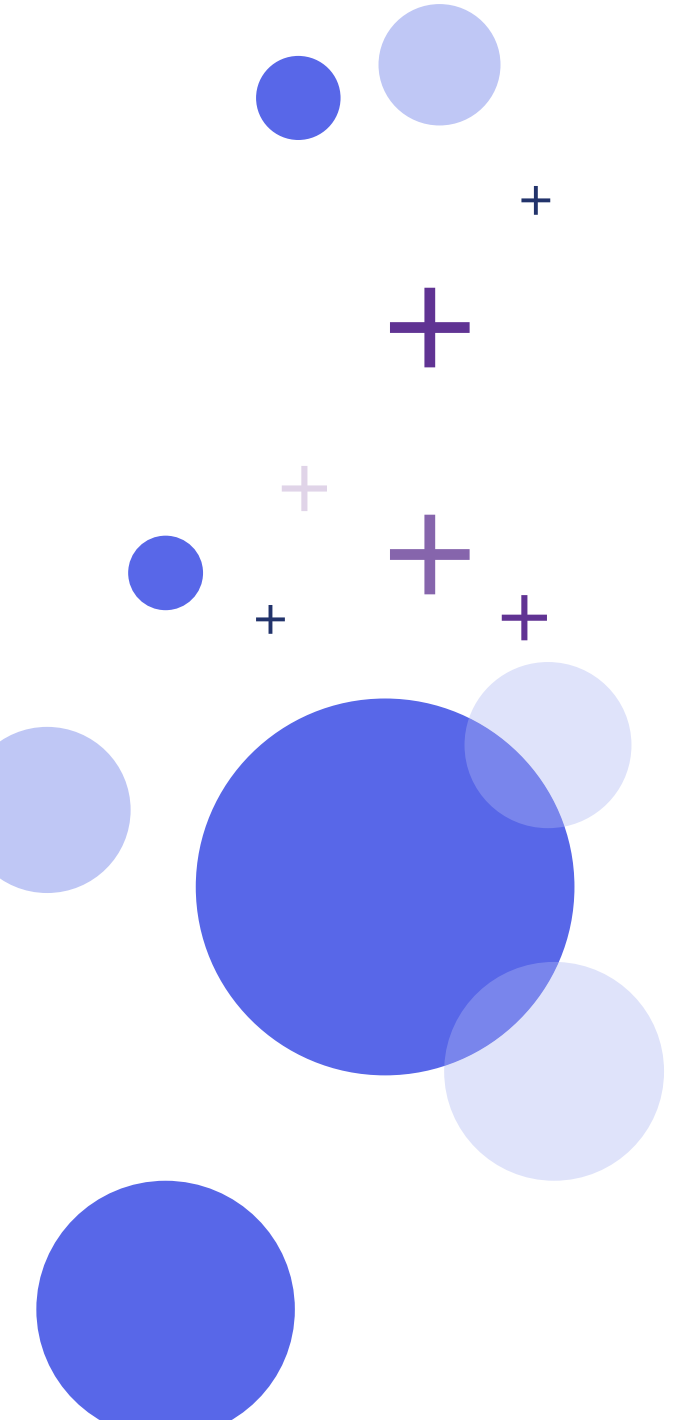
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A decorative graphic on the left side of the page features several overlapping circles in various shades of blue and purple, along with several plus signs (+) of varying sizes and colors (purple, pink, light blue) scattered throughout the composition.

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value you could provide if you didn't need to spend so much time wrangling insights from complicated and maybe even outdated tools.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.

A solid blue circle icon positioned to the left of the text.

**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 One

They want to make  
better decisions  
based 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 1

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

## 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

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## 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 Two

## 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 Two

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.



#### 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 Three

## 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 Three

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

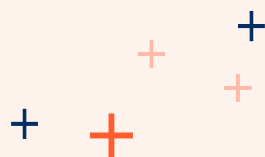


## Tableau Tip

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 Four

## 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 Four

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:

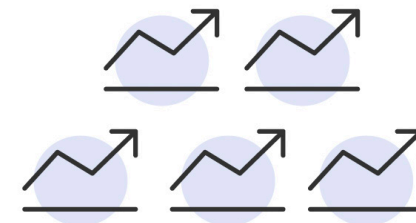
- Accelerated speed for evaluating and making decisions
- Increased efficiency of business operations
- Avoided cost of maintaining older systems

### 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

# 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 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 model](#)

### Expected impact

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

[Go to model](#)



# Chapter Five

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 Five

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

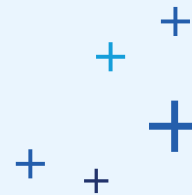
## Tableau Support and Services

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



Convince your boss Tableau is right for your team



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

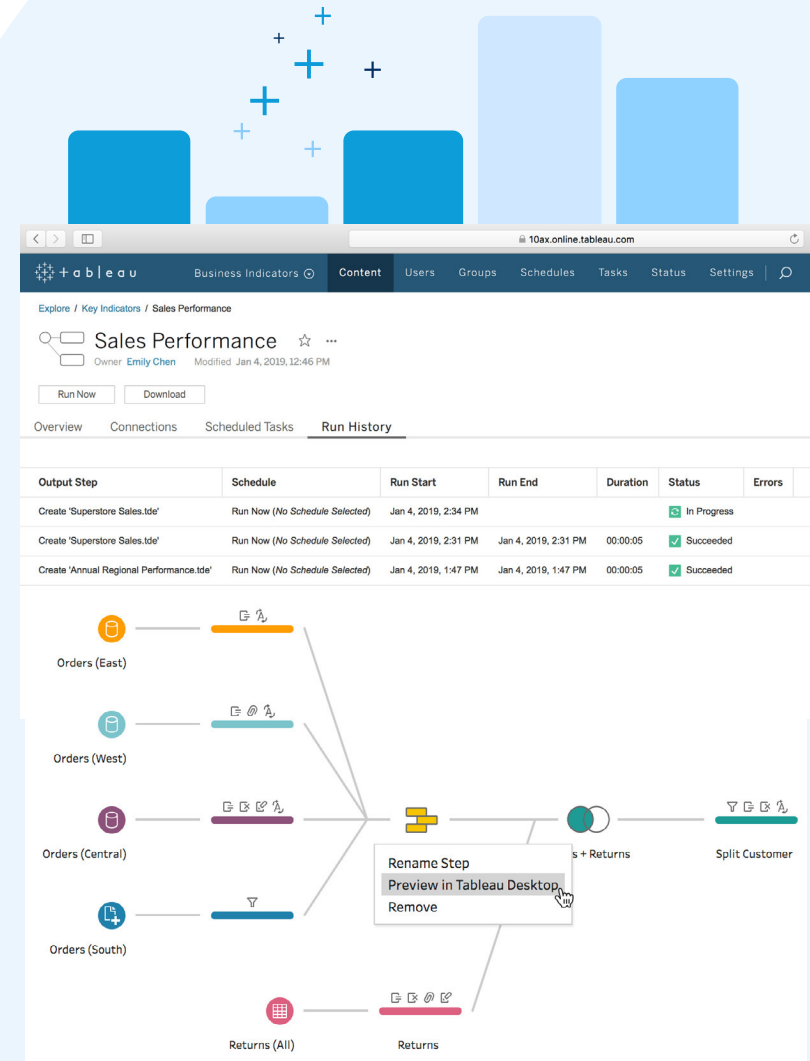
See a historical view of your flows' run history, including successful or failed runs at a glance. Keep track of the quality of your prep flows with out-of-the-box alerts if a flow fails.

### 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?

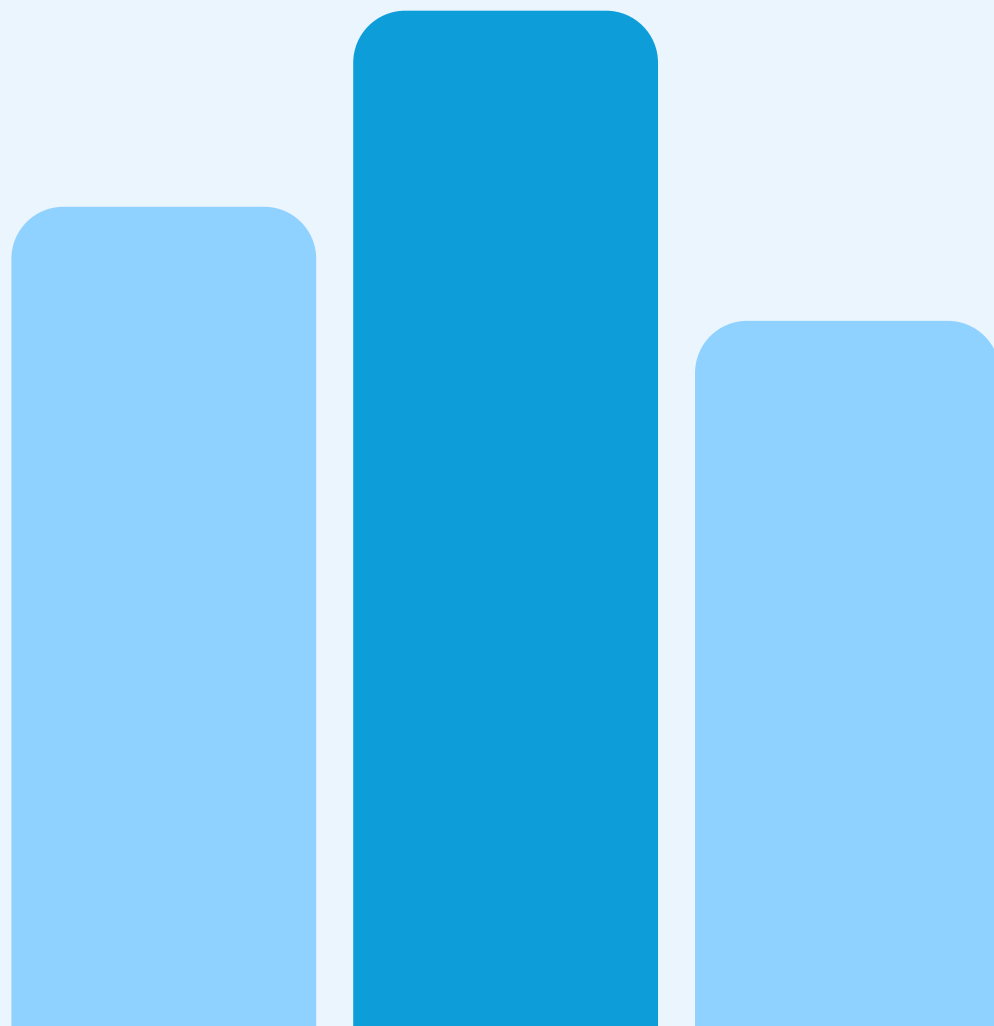




Tableau is the world's leading AI-powered analytics platform.  
Offering a suite of analytics and business intelligence tools, Tableau turns trusted  
data into actionable insights so you can make better decisions every time.

[www.tableau.com](http://www.tableau.com)