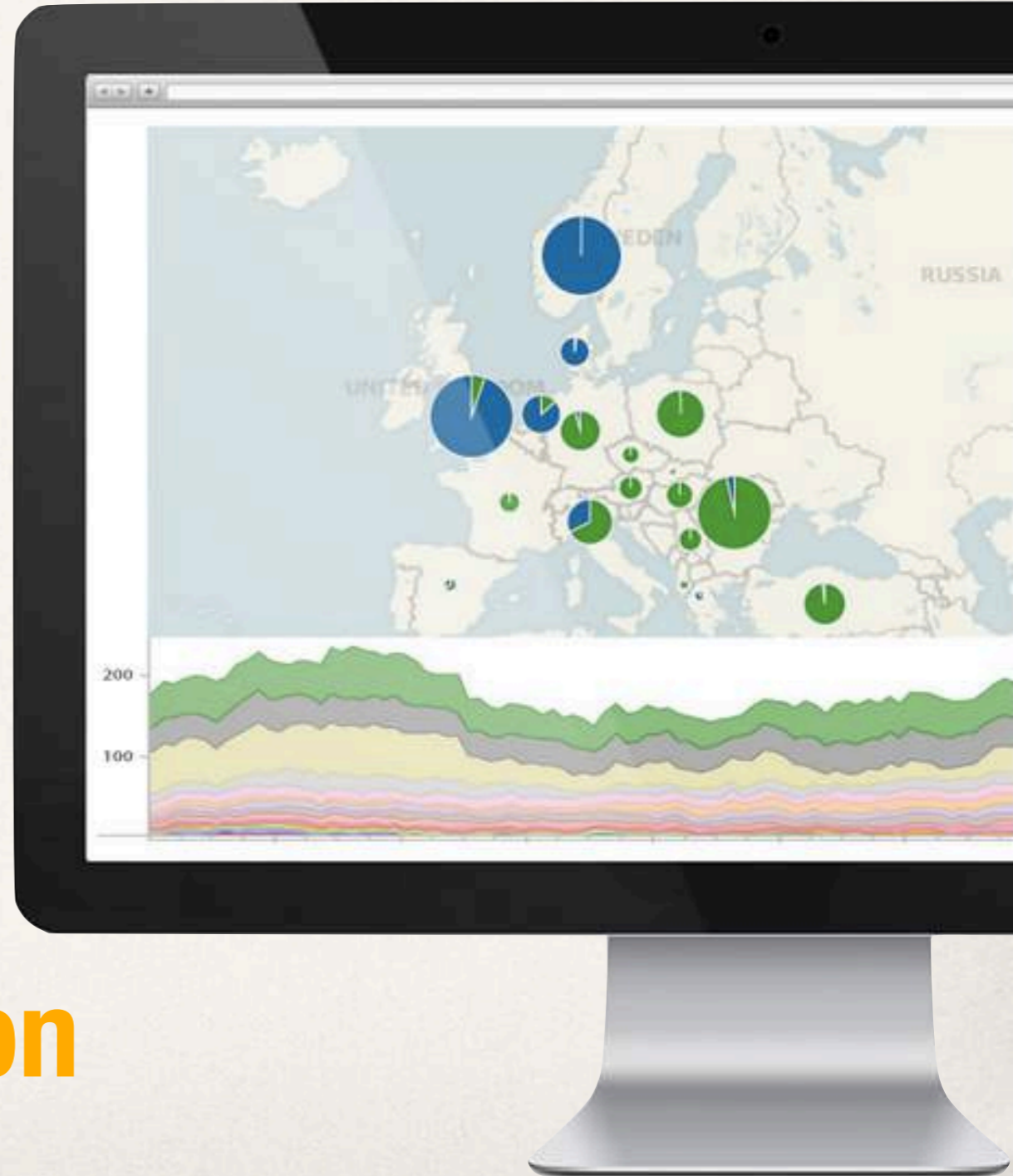


# The Recipe For Building a Tableau Tribe in Any Organization



**The goal of this document is to provide a blueprint for:**

- 1) A successful enterprise rollout**
- 2) Maximizing ROI of Tableau**

**“The beauty of it is it’s not that complicated. The server side interface is as easy as the desktop interface... It’s one of the most impressive ROI messages you can find with any software.”**

**- Paul Lilford,  
Director of EPM & BI**



**What can you do?**

# Put Tableau in the hands of 2 types of people:



## The Top

C-Level VP Director



## The Grass Roots

Business User Operations Analyst



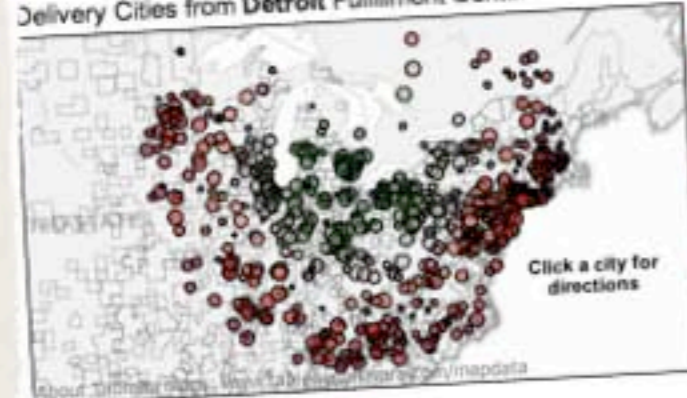
**Spread the gospel. One evangelist at a time.**



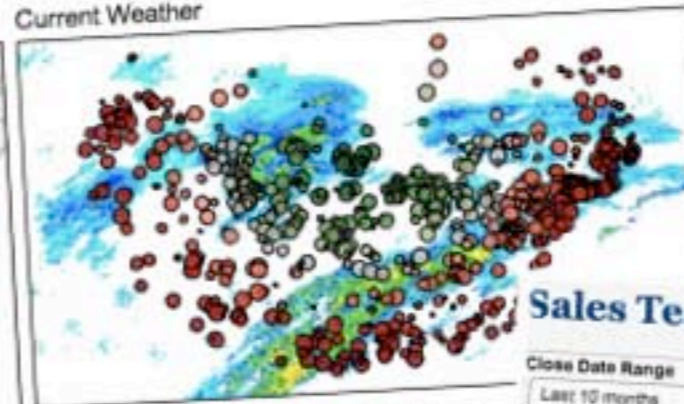
# Plant Tableau in multiple departments across the organization

## Routing and Logistics

Delivery Cities from Detroit Fulfillment Center



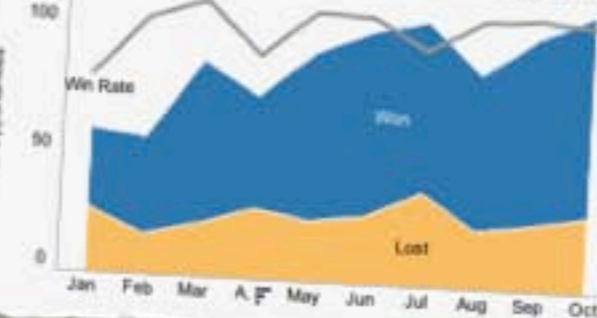
Current Weather



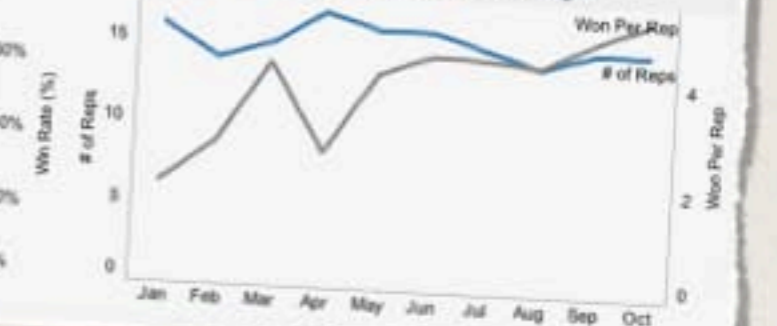
## Sales Team Efficiency



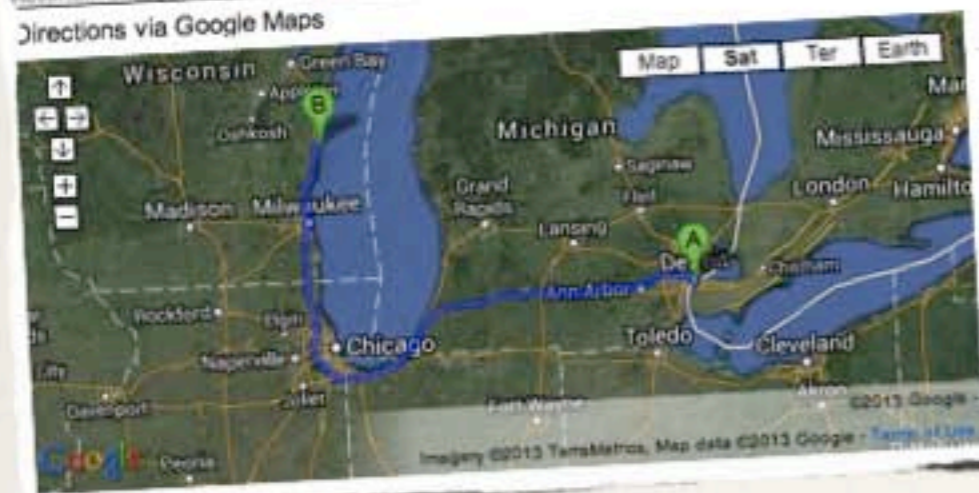
### Number of Opportunities vs. Number of Reps



### Wins Per Rep vs. Total Reps



Directions via Google Maps



# Create a platform within a company for Tableau evangelists to share & discover new tricks



Google  
Docs

jive

yammer

chatter

Cisco  
webex





## Product Support

The quickest way to find your answer? Search our Support resources. If you can't find what you need, we'll direct you to create a Support case.

Search Support Resources:



### Get Started

[Quick Start Guides](#)  
[Drivers & Activation](#)  
[Desktop Kickstart Service](#)



### Get Answers

[Product Help](#)  
[Knowledge Base](#)  
[Online Training](#)



### Get Ahead

[Community](#)  
[Classroom Training](#)  
[Consulting Services](#)

## Elite Account Management

Take traditional Support to a higher level. Designed for large, Enterprise users or complex environments.

[Learn more \(PDF\)](#)

## Expert Help Desk

Pick up the phone and get expert help when you need it most. Available in hourly blocks, this consulting service will help you quickly get the job done.

[Consulting Services](#) | [Learn more \(PDF\)](#)

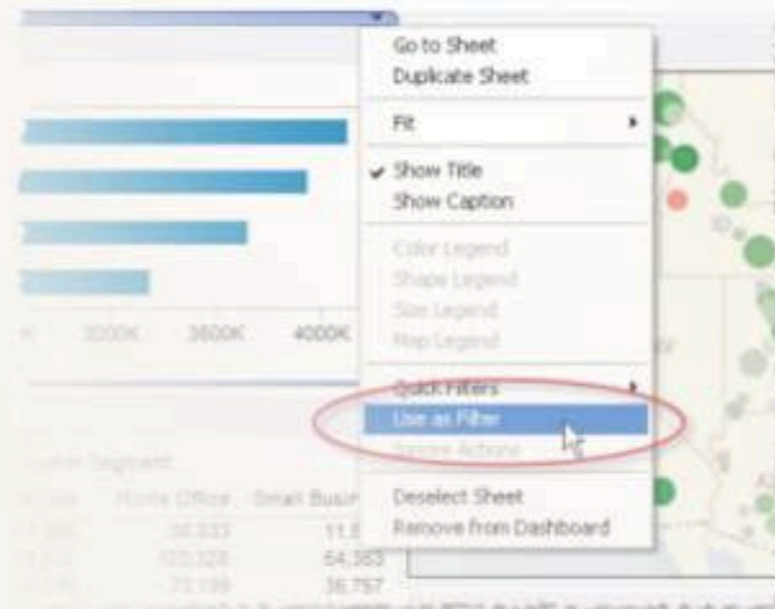
# Leverage all the free resources on [tableausoftware.com](https://tableausoftware.com)

# Simple, easy, visual quick-start guides

Formerly known as Sheet Links, Filter Actions filter to show related information in one or more target sheets. This type of action works well when you are building guided analytical paths through a workbook or on dashboards that filter from a master view to show more details.

## 1 Select a View to Use as a Filter

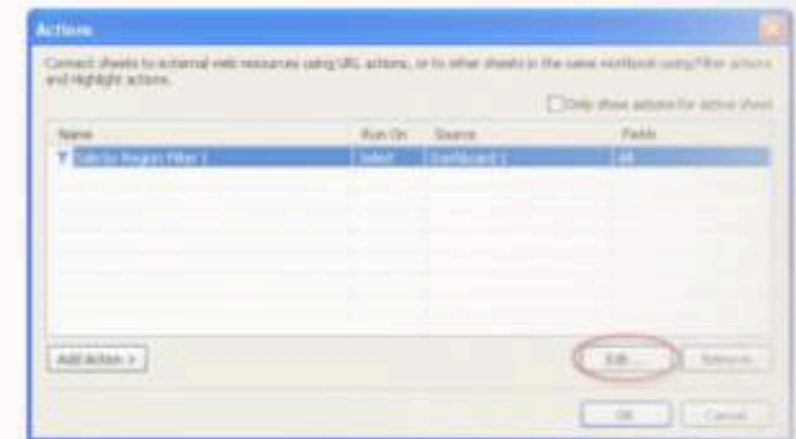
On a dashboard select a view and then select **Use as Filter** on the dashboard view menu.



As the action is created so when you select a mark it will filter the rest of the dashboard updates to only display related data.

## 2 Refine the Action

Select **Edit > Actions** to open the Actions dialog box. Then select an action and click **Edit**.



Any action you create displays in the Actions dialog box. You can add Filter, Highlight, or URL actions.

## 3 Specify the Action Settings

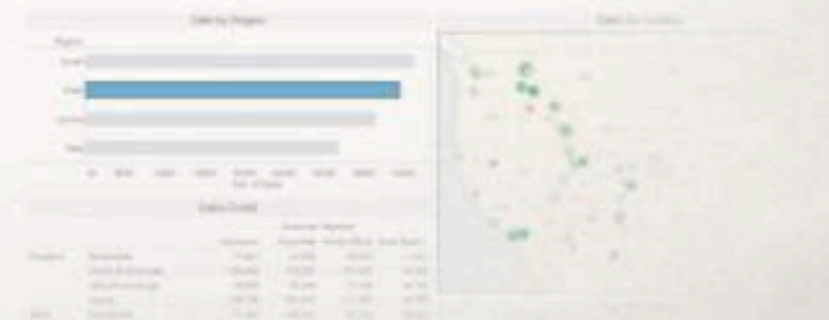
In the Edit Filter Action dialog box select the source sheets, target sheets, and the fields to filter. You can also select whether to run the action when you hover, select, or right-click the source sheet. When finished, click **OK**.



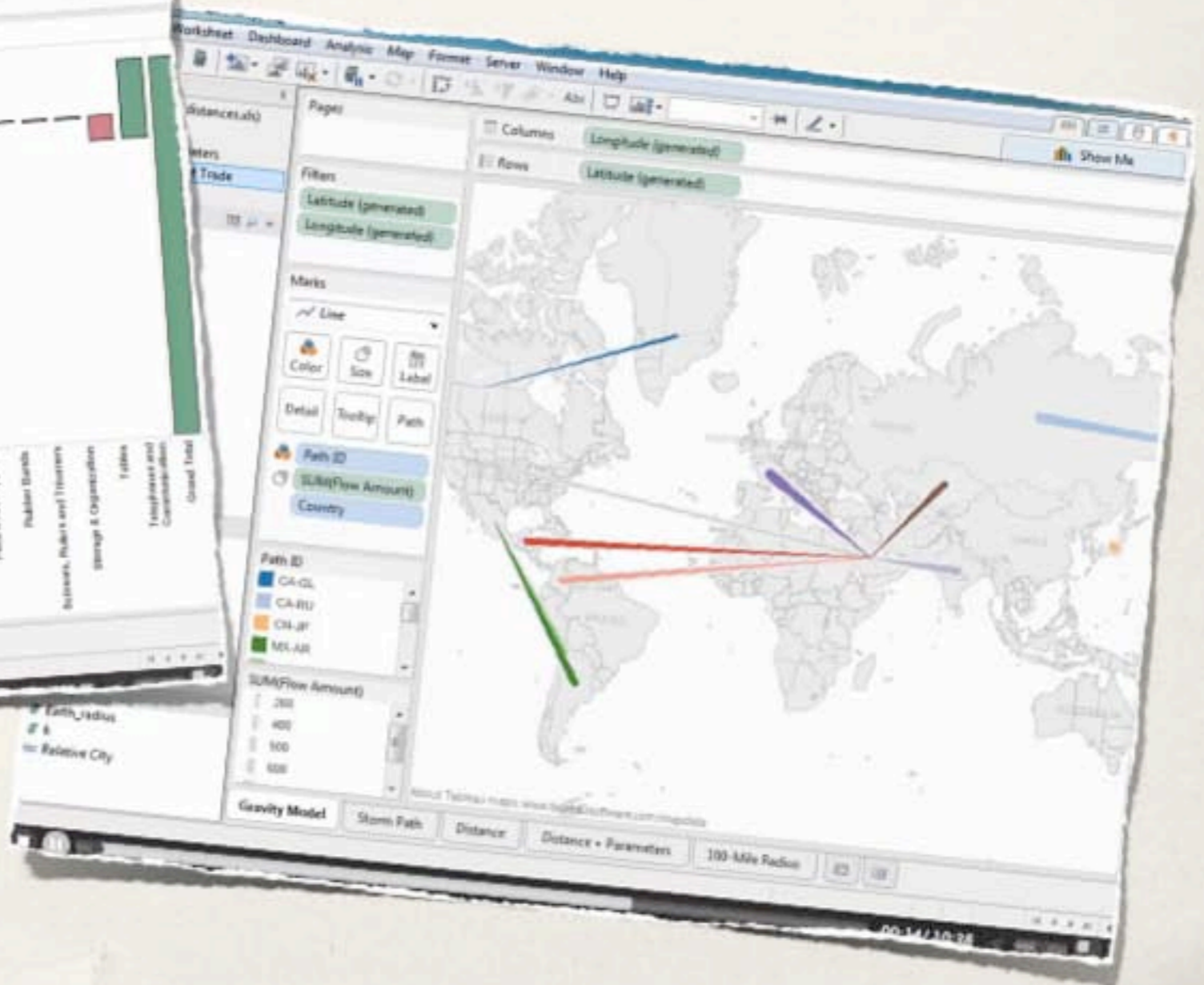
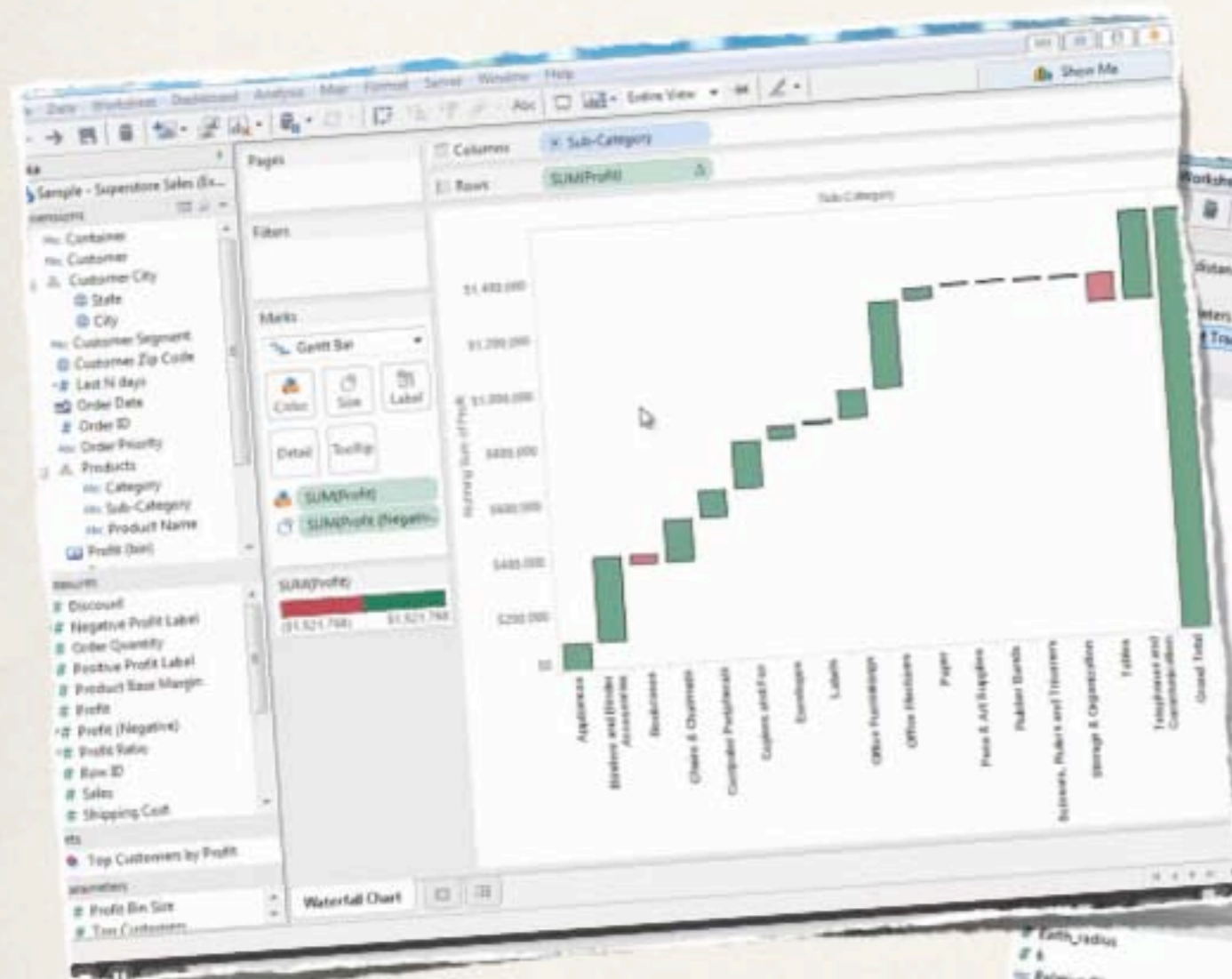
Select the clear or deselect option to

## 4 See it in Action

Hover, select, or right-click the source view and watch the other views update to just show you the related data.



# Over **70** on-demand video tutorials



# Over 1,500 pages of product manual documentation online

Home > Advanced Analysis > Forecasting > Creating a Forecast

## To Create a Forecast

Forecasting requires a view that uses at least one date dimension and one measure. For example:

- The field you want to forecast is on the **Rows** shelf and a continuous date field is on the **Columns** shelf.
- The field you want to forecast is on the **Columns** shelf and a continuous date field is on the **Rows** shelf.
- The field you want to forecast on either the **Rows** or **Columns** shelf, and discrete dates are on either the **Rows** or **Columns** shelf.
- The field you want to forecast is on the **Marks** shelf, and a continuous date or discrete date set is on the **Row**, **Column** or **Marks** shelf.

To turn forecasting on, either right-click on the visualization and choose **Forecast > Show Forecast**, or choose **Analysis > Forecast > Show Forecast**.

With forecasting on, Tableau visualizes estimated future values of the measure, in addition to actual historical values. The estimated values are shown in a lighter color than the historical data.



## Create a calculated field for the average

### Step 1

Connect to your data source. This example uses the Sample - Superstore data source.

### Step 2

Select **Analysis > Create Calculated Field**.

### Step 3

In the Create Calculated Field dialog box, do the following tasks:

1. In the Name text box, type **Average Sales**
2. In the Formula text box, type the following:

```
WINDOW_AVG(SUM([Sales]))
```

# Hundreds of step-by-step knowledge base articles

The screenshot shows the 'Calculated Field' dialog box in Tableau. The 'Name' field is set to 'Average Sales'. The 'Formula' field contains the expression `WINDOW_AVG(SUM([Sales]))`. A green checkmark and the text 'The calculation is valid.' are displayed below the formula. At the bottom, there are three search panels: 'Fields' (showing 'Category'), 'Parameters' (showing 'Profit Bin Size' and 'Top Customers'), and 'Functions' (showing 'ABS' and 'ACOS'). A 'Category' panel on the right shows 'Data type: String'.

# Dozens of product & industry whitepapers

## Tableau Server Scalability Explained



This paper explores a number of factors when evaluating scalability including workbook complexity, data volumes, browser and network settings, and hardware. [See preview.](#)

This whitepaper explains the scalability tests, methodology and results the team at Tableau administered to help our customers plan for large deployments. It will describe, through scale examples of Tableau Server, describe Tableau's current performance and scalability, set some baselines to help you understand the key elements of scalability testing, review the results of the tests, and provide guidance on how you can apply these

DOWNLOAD

Download this whitepa

# Web and download industry & department examples



## E-mail and CRM Analytics

Quickly determine which campaigns work, where to invest.

[Learn More](#) →



[Learn More](#) →

## Human Resources Analytics

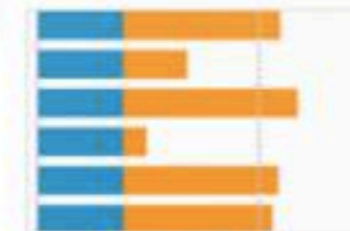
Leverage your data to improve retention, recruit effectively, maximize productivity.



## Marketing Analytics

Understand trends, design new campaigns with do-it-yourself analytics.

[Learn More](#) →



[Learn More](#) →

## Sales Reporting and Analytics

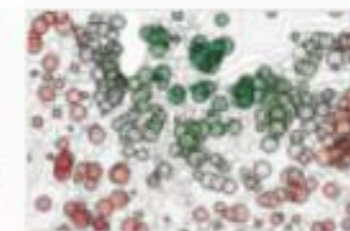
Create pipeline views and quota dashboards that are easily shared.



## Software Development Analytics

Understand customer needs and find bugs as early in the development cycle as possible.

[Learn More](#) →



## Supply Chain Analysis

Combine maps, visual analytics for dynamic insight to improve logistics.

[Learn More](#) →



## Tech Support

Track, evaluate and manage your cases more effectively.

[Learn More](#) →



## Website Analytics

Explore unlimited web data for patterns and trends.

[Learn More](#) →

# Mike Ditka: Legendary Player and Coach

Like 28 Tweet 18

Author: Dan Montgomery published on Data Potential

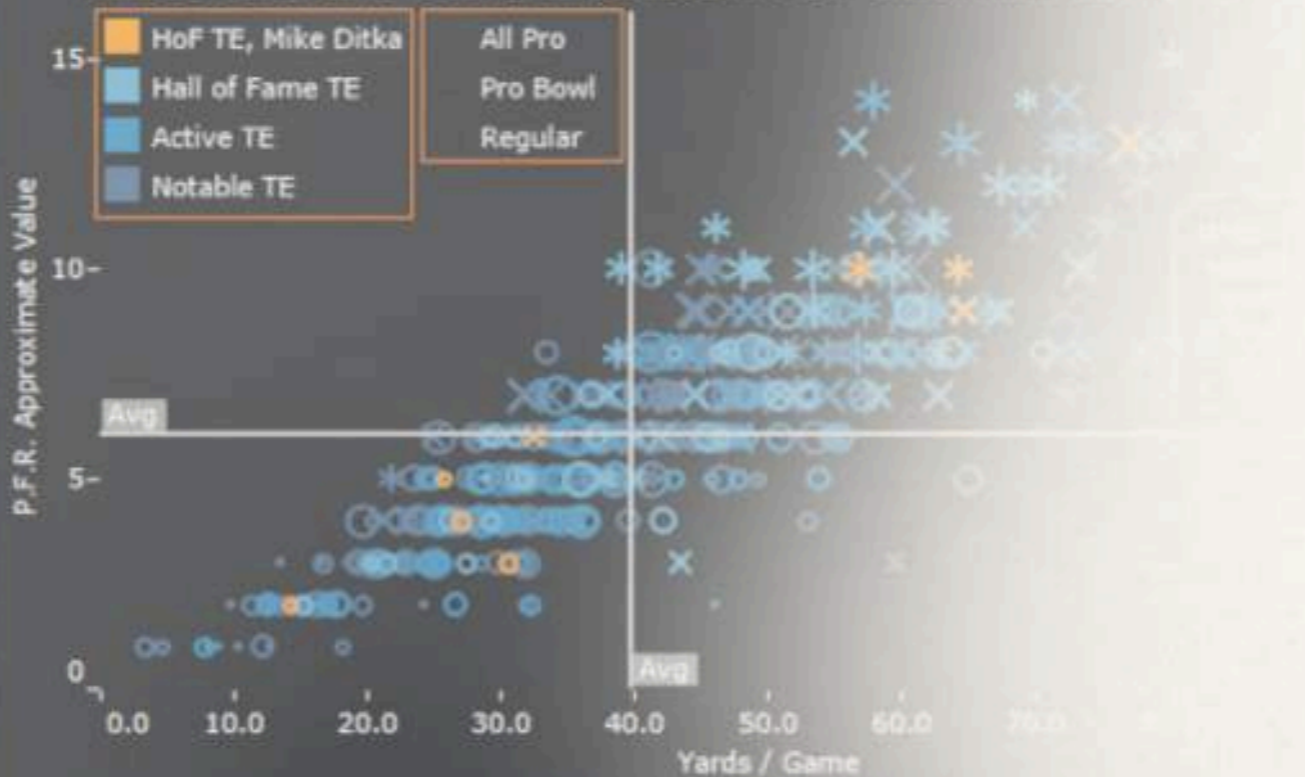
In commemoration of the retiring of Mike Ditka's number this week, Dan Montgomery created a visualization of his career at a glance, and compare his performance with other Hall of Fame players.

Da Player Da Coach

## Mike Ditka: Legendary Player



### Mike Ditka and Other Notable TE's Performance by Season



### Player Ditka vs Other TE's Value



# Creative examples across the web on Tableau Public



HOW IT WORKS  
see the magic happen

Recommended Authors

# Visualizations shared from Tableau's community leaders

## Recommended Authors

**Bloggers**

**Andy Kriebel**

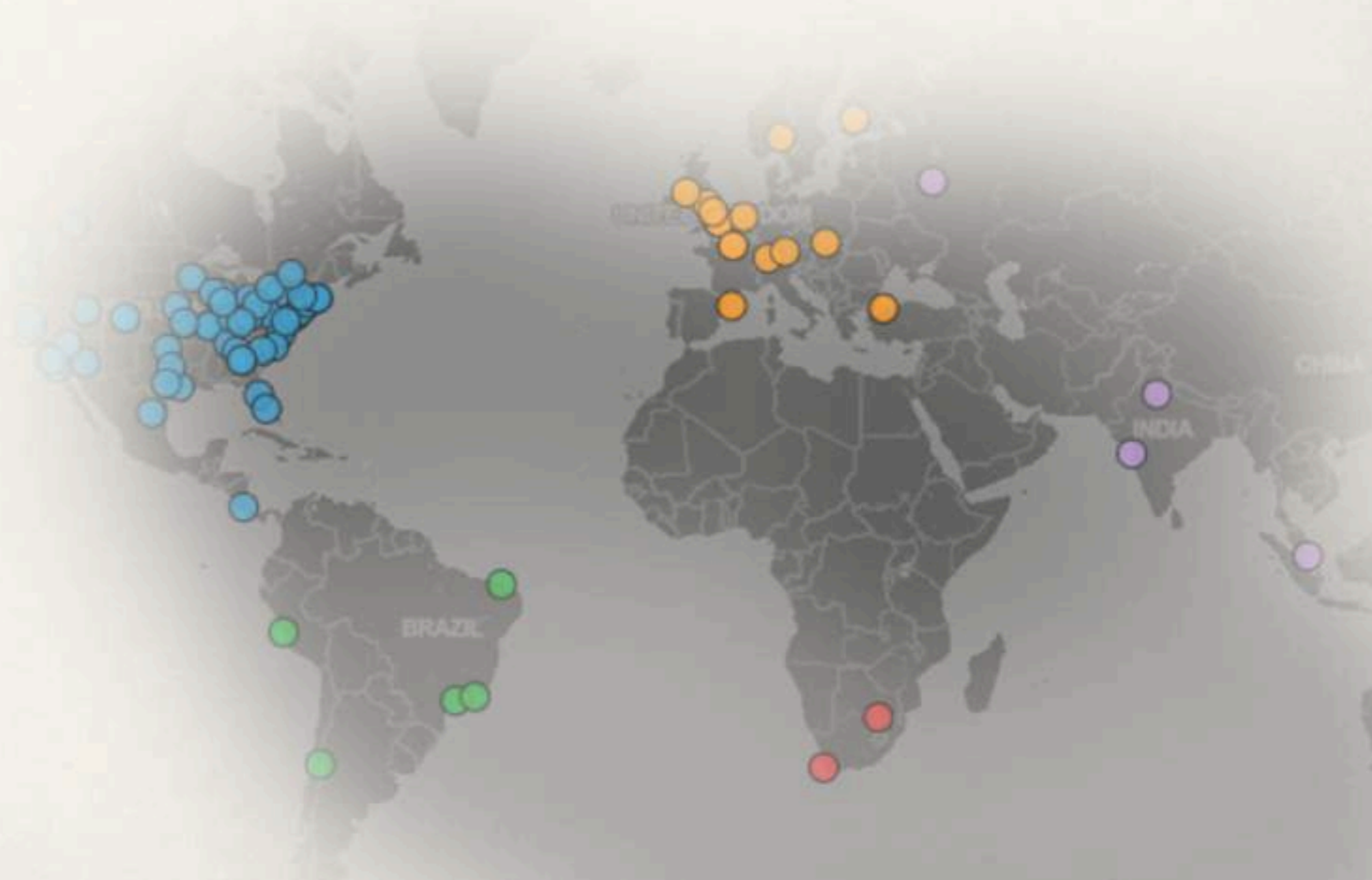
Andy is a Tableau Zen Master and Data guru at Facebook. His profile is chock full of clean dashboards and examples of data done right.

[View Profile](#)

**Journalists**

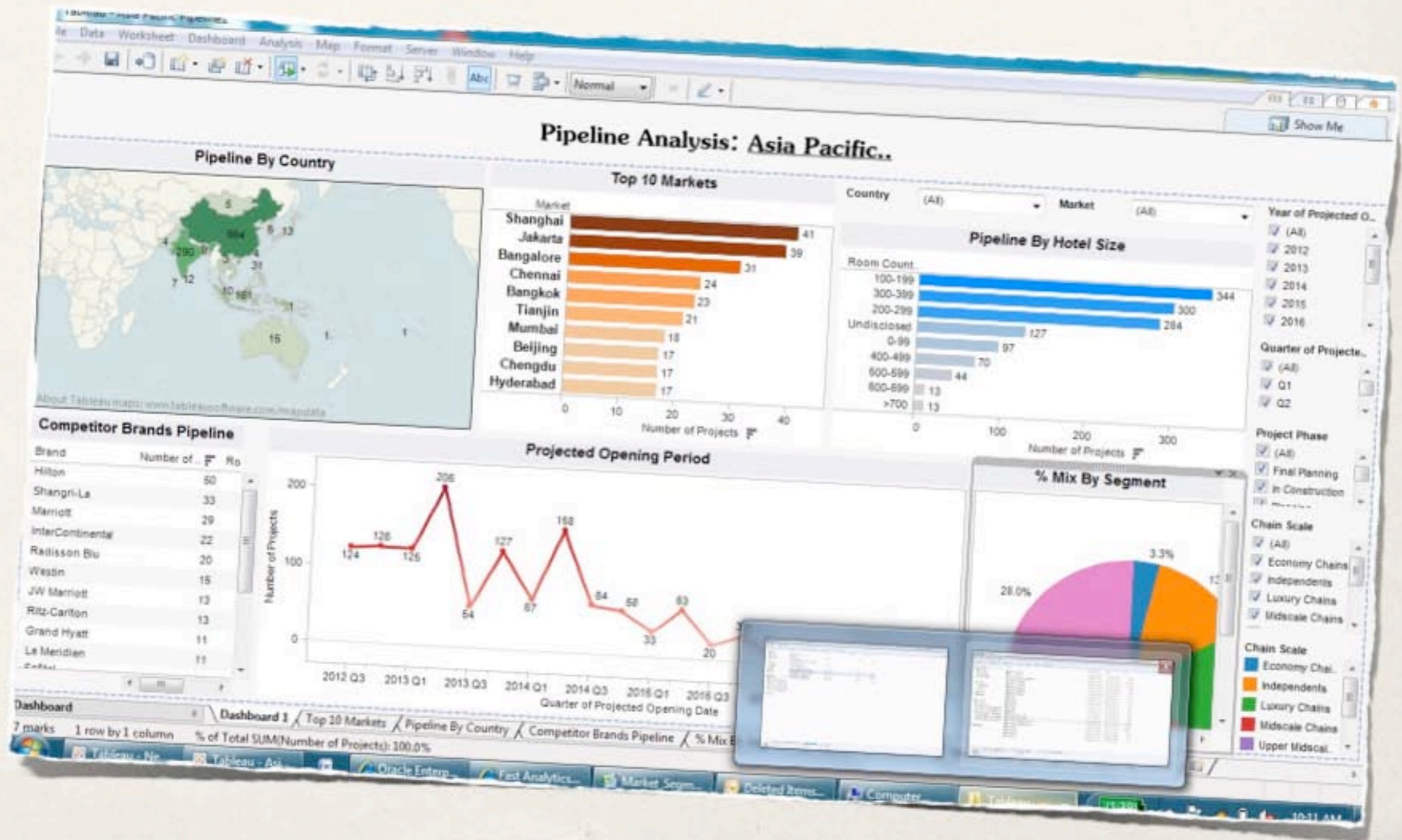
**Featured**

# Tableau user community group meetings around the world

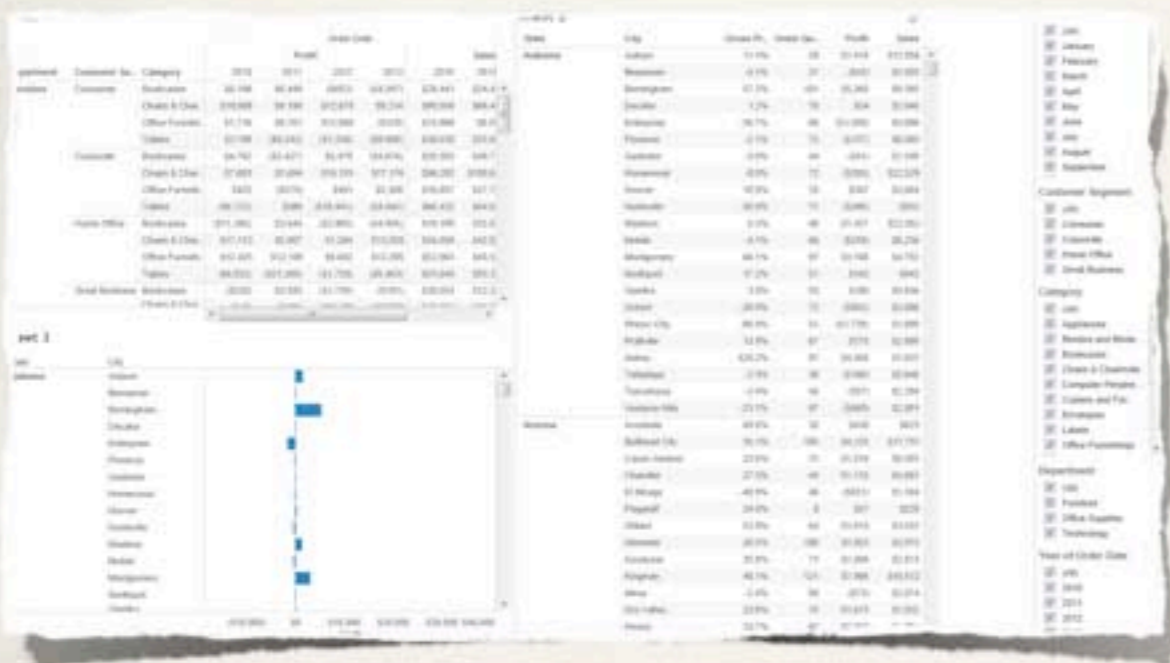


**What can Tableau do?**

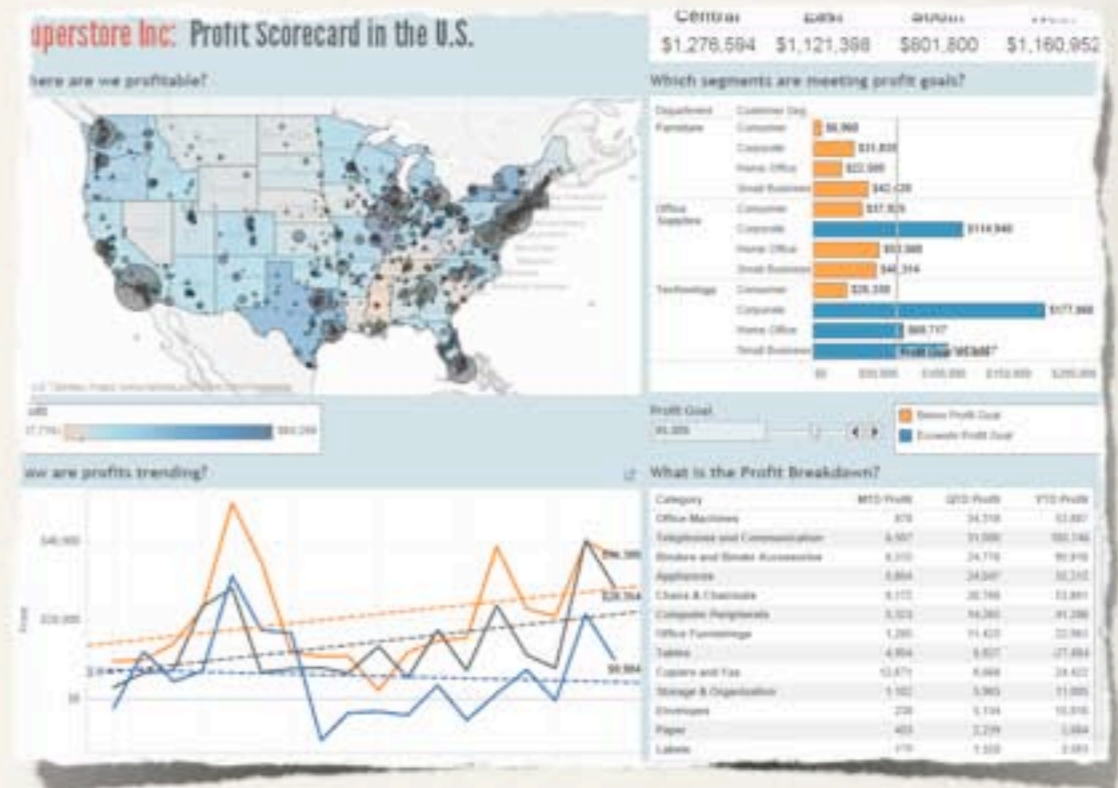
# Attend user meetings, provide tips and feedback



# Review dashboards, add polish and ideas



**Bad**



**Good**

# Professional services, introduction to service & technology partners

## Tableau Partners Around the World

Select a country to view respective partners:



About Tableau maps: [www.tableausoftware.com/mapdata](http://www.tableausoftware.com/mapdata)

Country / Territory	Partner Type	Partner Name
Argentina	Reseller	Accuratio S.A.
		BluePatagon
Australia	Alliance	Altis Consulting
		Clarus Analytics Pty Ltd
		DWS Advanced Business Solutions.
		Mazero Pty Ltd
		Performance Analytics
		See-Change Solutions
	OEM	Baseplan Software Pty Ltd
	Reseller	Beyond Analysis Australia Pty Ltd
		Datalicious Pty Ltd
		Deloitte Touche Tohmatsu Ltd

### Partner Type

- (All)
- Null
- Alliance
- Consulting
- OEM
- Reseller
- Technology

### Country / Territory

- (All)
- Argentina
- Australia
- Austria
- Belgium
- Brazil

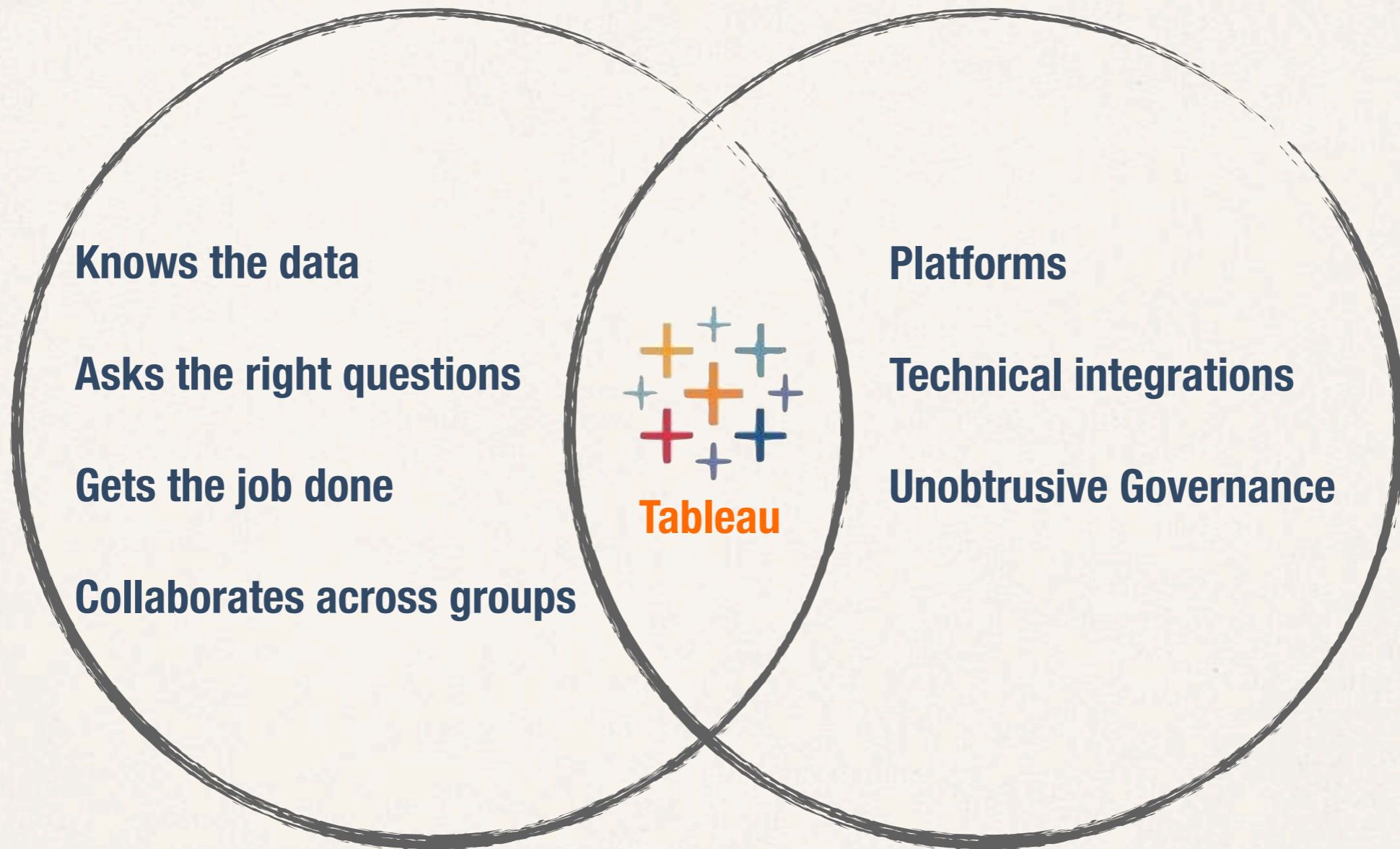
**Who has done this  
successfully?**



**CISCO**



# Leverage the strengths of Business + IT



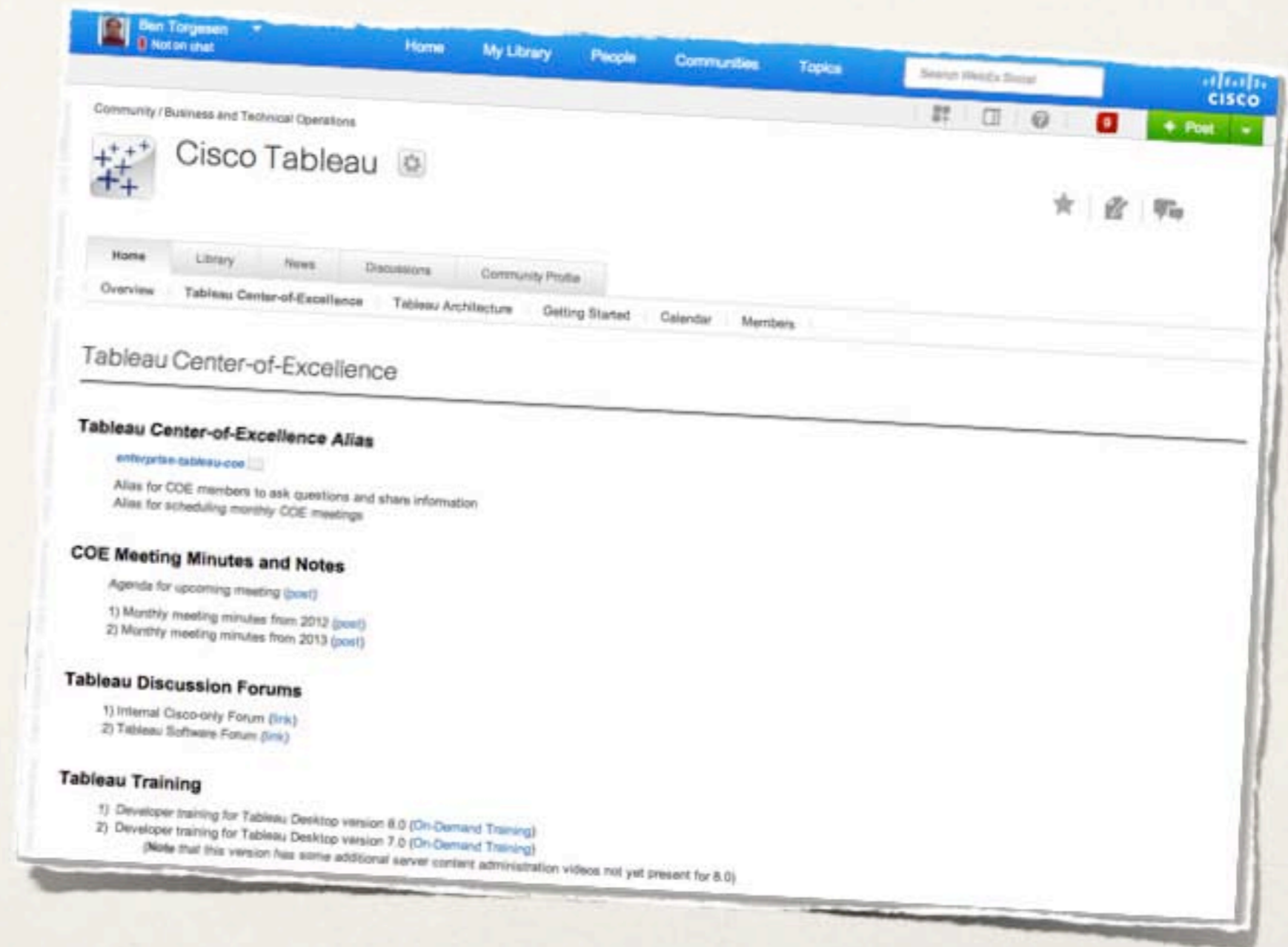
# IT created a Center-of-Excellence platform, the business supplied the content and discussion

Monthly meetings

Discussion forums

Training tools

Best practices



**“We point the business to the wonderful training videos that Tableau provides. This is one of the key enablers for self-service BI and what allows new business teams at Cisco to get up to speed as quickly as they do.”**



# Business owns the content and collaboration, IT handles what it does best

Server administration

24/7 monitoring, maintenance, upgrades & case resolution

Integration with other tools

Vendor management

Performance tuning

Operational statistics



# New business units engage IT, in “2 weeks & 2 meetings” they have a site up and running

Engage IT via email alias

30 min. meeting to evaluate use case

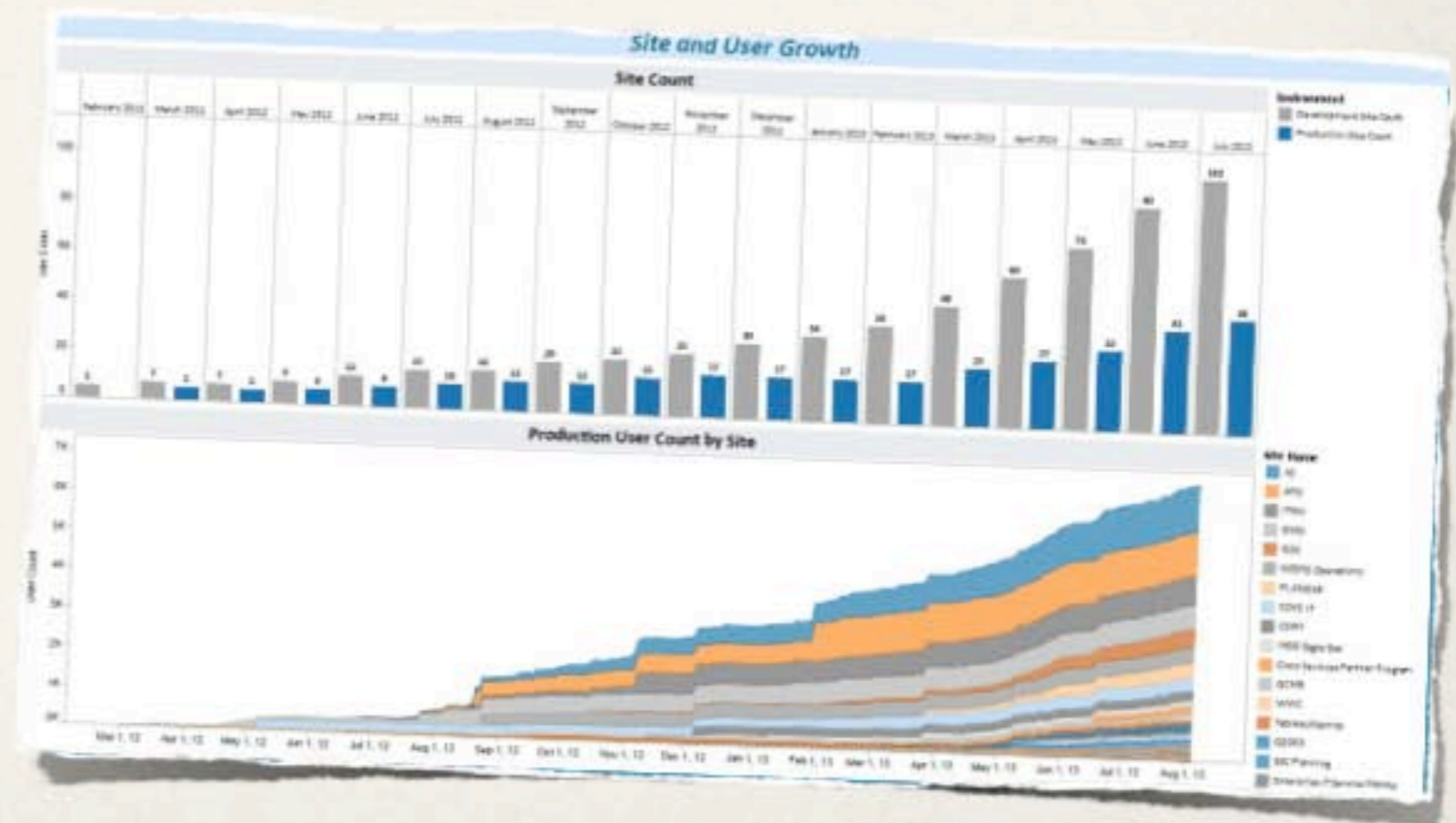
Engagement questionnaire  
(14 questions)

Identify approver for functional area

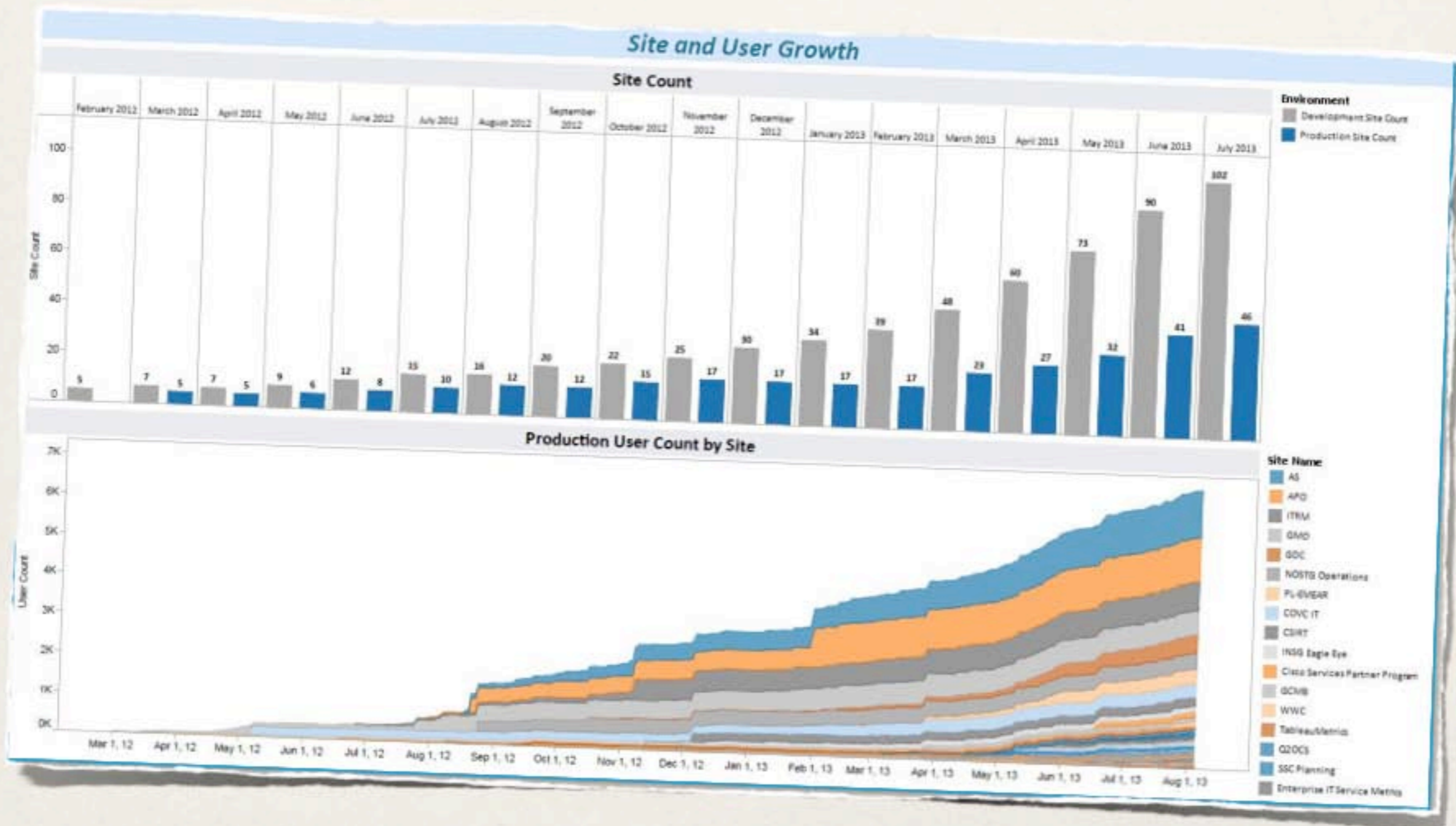
Final 30 min. meeting to review data  
sources and overlap with other tools

With approval, create site on Tableau  
servers

Update WebEx Social center of excellence



“From 20 sites (business teams) a year ago, to over 100 today.”



# High ROI and Customer Satisfaction...

**“ Operating at the pace of business.”**

**“Best thing to come from IT in years.”**

**“Have retired almost all spreadsheet reports.”**

**“Replaces a lot of manual work”**

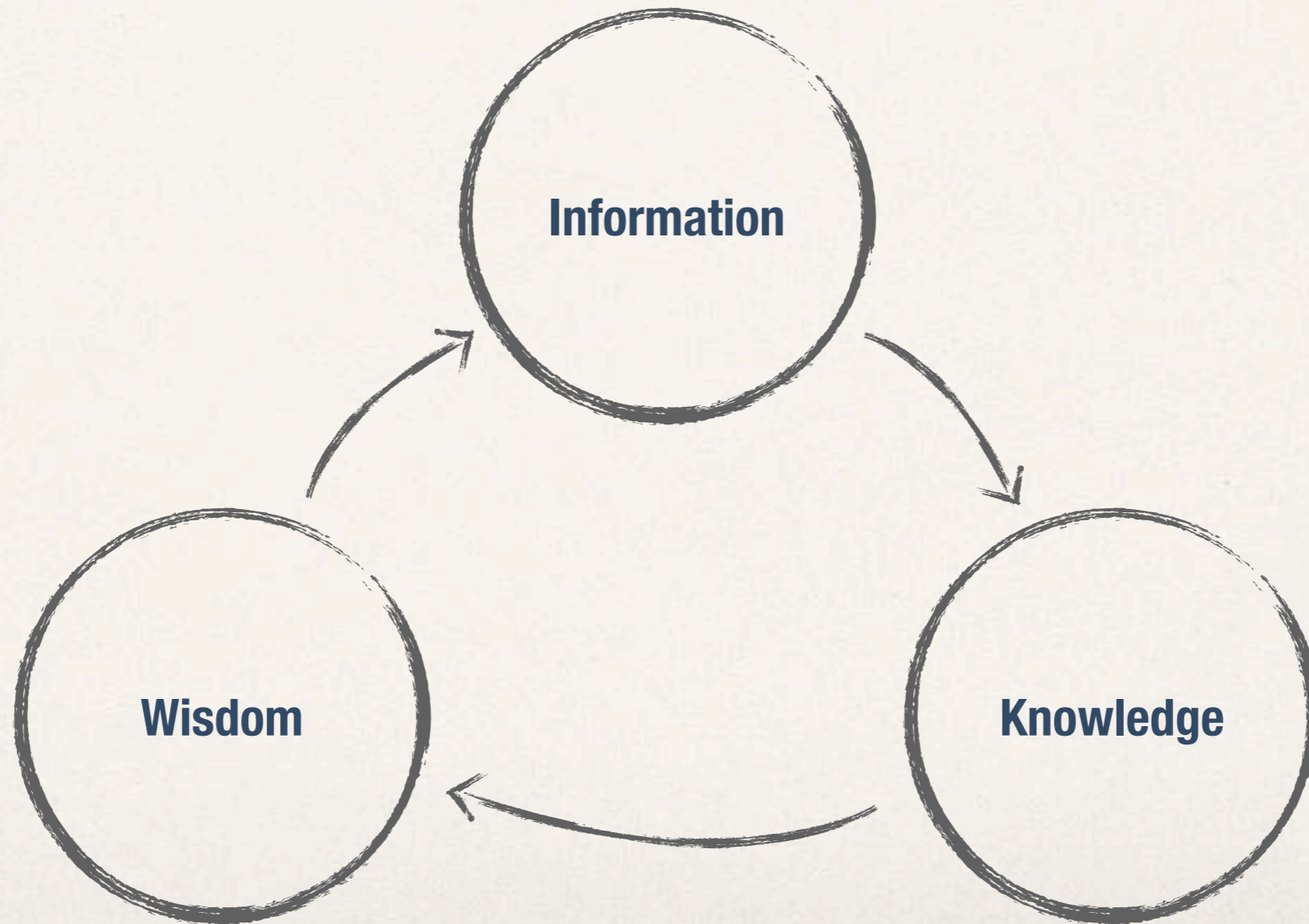
**“ CIO has asked teams presenting Quarterly Ops Metrics to use Tableau (instead of PowerPoint)”**

**facebook**®

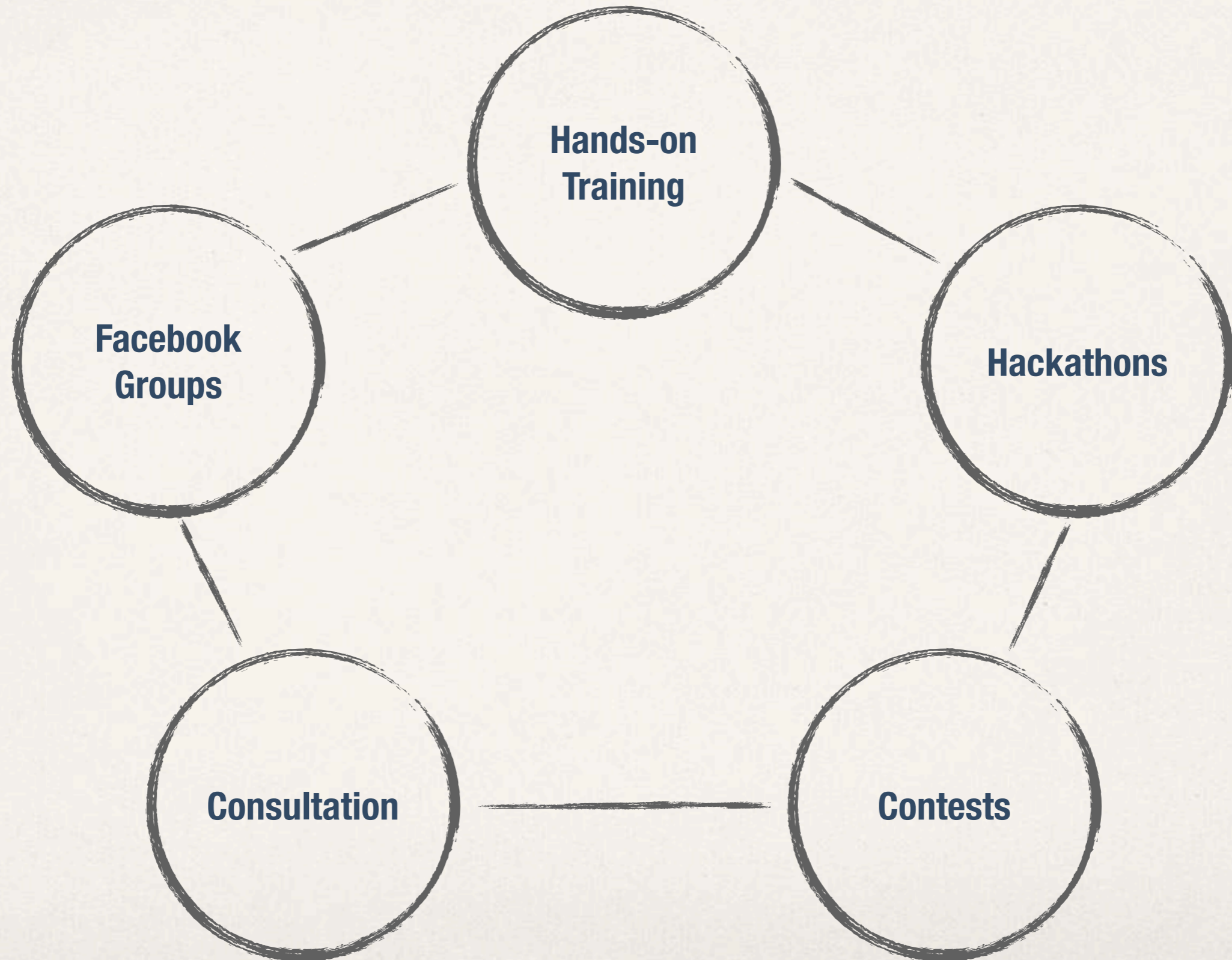


**“ We expect everyone at Facebook to be good at finding the biggest problems to work on.”**

**- Mark Zuckerberg:  
Letter to Investors**



# Facebook created a comprehensive program



# Facebook group pages serve as the Center-of-Excellence

The screenshot shows a Facebook group page for 'Tableau users'. The group has tabs for 'members', 'Events', 'Photos', and 'Files'. The main post is by Siddharth Manuja, asking how to add a date filter to a calculated field. The discussion includes several replies from Andy Kriebel, Nick Geiser, and Mike, providing technical advice on using window\_avg functions and date filters in Tableau.

**Tableau users** members Events Photos Files

**Siddharth Manuja**  
How do I add a date filter to a calculated field (To compare a metric for part of the date range vs the entire date range for example)  
about a month ago

Like Comment

**Andy Kriebel** So basically you want to compare two date fields, right?  
March 12 at 12:07am via email · Like · Reply

**Siddharth Manuja** I have a metric (say page likes) for a date range (consider a month). I want to find out how many times more the average likes were for the last 15 days vs the average likes for the first 15 days  
March 12 at 4:05am · Like · Reply

**Nick Geiser** you can filter down to the past 15 days (or any other period) by dragging your date field onto the filter shelf (double-clicking the date field will also cue up a "quick filter")—however, the result will only show data from the period you specified with... See More  
March 12 at 7:53am · Like · Reply

**Andy Kriebel** You're going to want to use window\_avg functions that count the offset from the middle date.  
Mike, can you show Sidd the formula? Or Sidd, you can look in the function help in the calculated field dialogue box.  
March 12 at 9:34am via email · Like · Reply

**Siddharth Manuja** Tried it, I guess the offset in it works only for a fixed range, I have a variable date range (start date and end dates fields which change based on selection). Also tried using a datediff calculated field by doing 'End Date-Start Date+x', but window\_avg accepts just integers in the offset, so didn't work.  
March 12 at 10:07am · Like · Reply

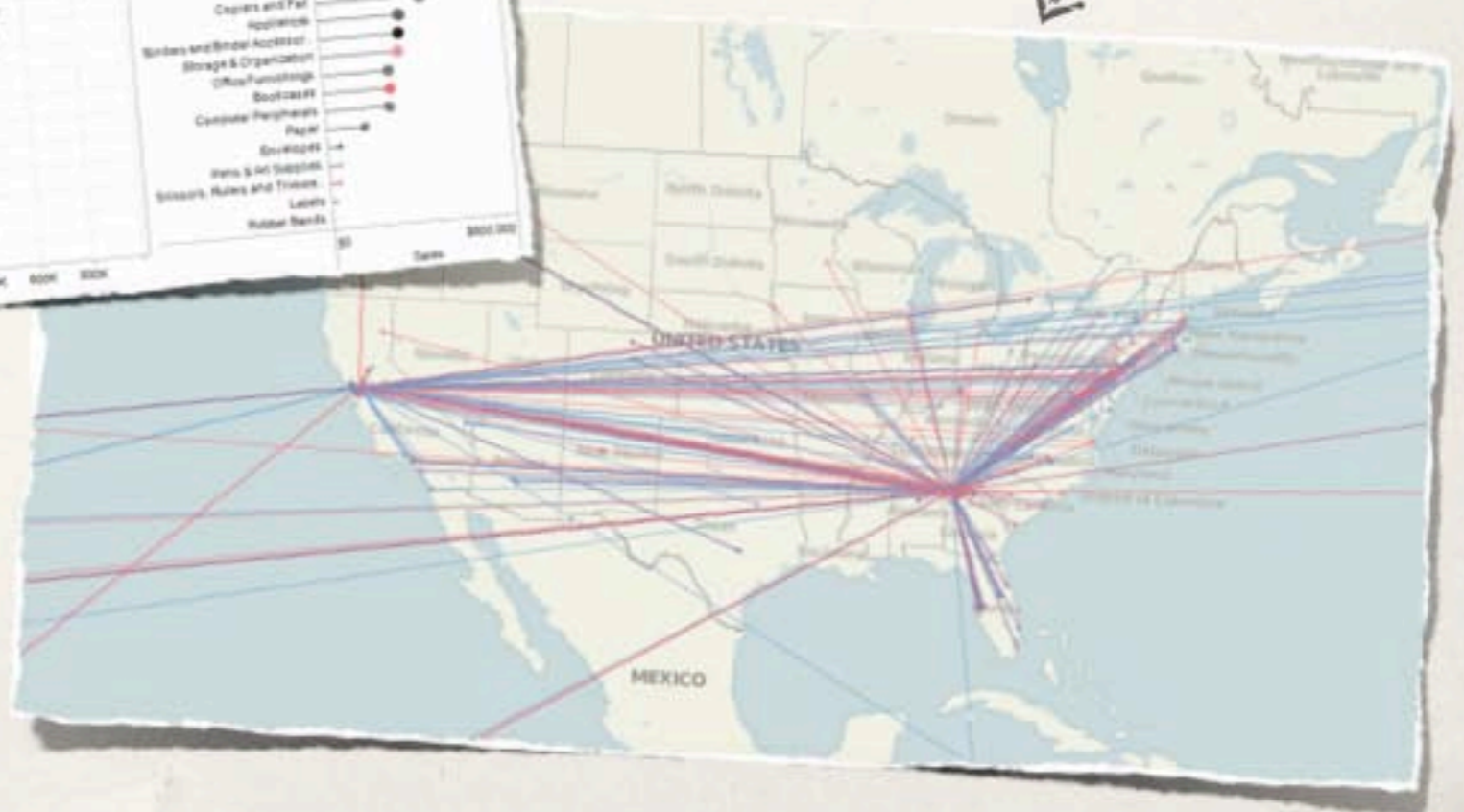
**Nick Geiser** how about this? (average for past 15 days)  
IF DATFDIFF(day:TODAY(),[yourDateField])<=15 THEN AVG([yourMetric])

# Comprehensive internal training program for all Tableau users



Visual best practices

Learning to hack



# Committed to empowering people

**“Data visualization - 200+ people have a good grasp of the fundamentals...**

**...Tableau - We now have more than 500 analysts”**

**- Andy Kriebel,  
Data Visualization Guru - Facebook  
Data Visualization Summit - April 2013**

# Where do you go next?

- 1) Put Tableau trials in the hands of your users
- 2) Familiarize yourself with the resources on the website
- 3) Contact your Account Manager for a partner in executing against this blueprint

