



# Beyond Excel:

Make your data smarter,  
more powerful, and easier  
to use with Tableau



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# Three Key Benefits Tableau Brings to the Table—and Excel Doesn't

Are you trying to figure out the right strategy for your business by spotting new trends in your data and identifying insights?

These days, the market is more competitive than ever, and data analysts are looking for tools that will help them quickly capitalize on the value of their data to create business impact. Once, that go-to tool was Microsoft Excel, the resource for tracking and sorting data and performing financial, mathematical, and statistical operations. But with the current pace of business, your comfortable, well-worn spreadsheet isn't robust enough to solve complex challenges and meet growing customer demands.

With its powerful toolbox of visual data storytelling and artificial intelligence (AI), Tableau makes your data smarter, more powerful, and easier to manage. Whether you're a data analyst by trade or you rely on data day-to-day, Tableau is the business intelligence platform that empowers everyone with data-driven insights to make better business decisions.

**Here are three things you can do with Tableau to unlock more value from your data.**



## BENEFIT #1

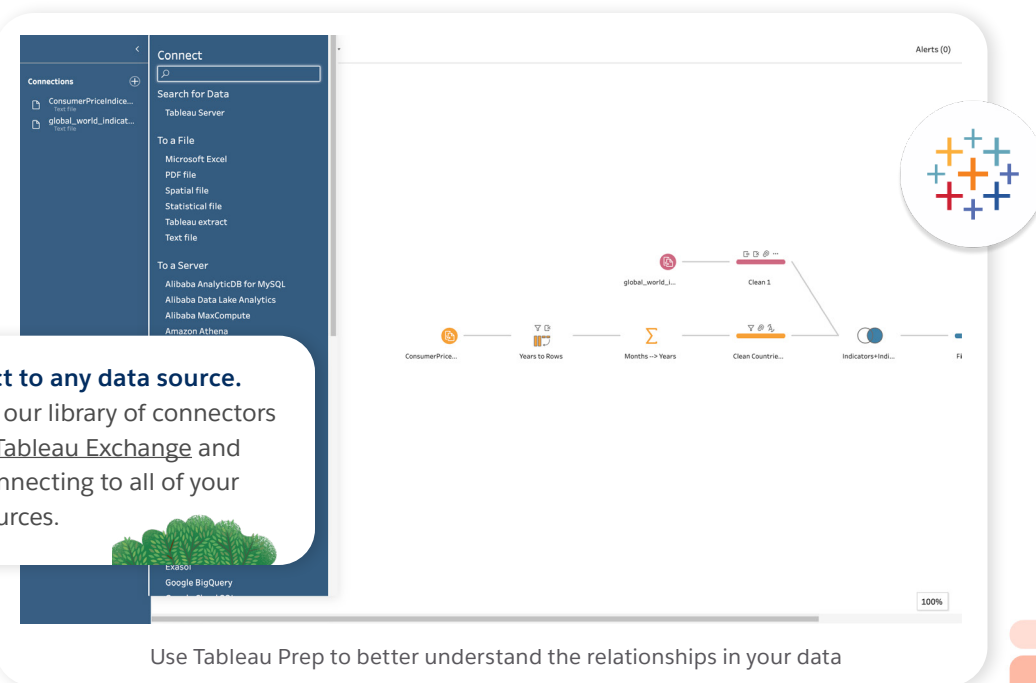
## Supercharge your data, seamlessly.

The power of Tableau lies in something you can't see: Hyper, Tableau's blazing fast SQL engine that is designed to process queries and ETL transformations on huge, complex datasets. It supercharges Tableau's response times so you can combine, query, and extract from massive volumes of data in seconds—making every function simpler and more powerful.

## Consolidate data with ease.

Excel might be able to tell you how many customers you have in each region. And that's a good place to start. But what if you need to know why customer satisfaction is lower in Canada than in the United States? Could it be the speed of delivery? The quality of the product? The sales team based in Toronto? The possible answers are almost endless. You need a way to unify your data sources to find out.

Tableau can easily pull together all the data you have across various worksheets and workbooks—even data from non-Excel sources such as Snowflake, Google Analytics, and BigQuery. Bring context to your data and merge different data sources by quickly consolidating subtables, worksheets, and workbooks—all at once. With Tableau, you save time by getting a complete view of your data in one place, no matter the source.



The image shows a screenshot of the Tableau Prep interface. On the left, a 'Connections' pane lists various data sources like 'ConsumerPriceIndice...', 'global\_world\_indicat...', 'Microsoft Excel', 'PDF file', 'Spatial file', 'Statistical file', 'Tableau extract', 'Text file', 'Alibaba AnalyticDB for MySQL', 'Alibaba Data Lake Analytics', 'Alibaba MaxCompute', and 'Amazon Athena'. A search bar is visible above the list. In the center, a data flow diagram shows a sequence of steps: 'ConsumerPrice...', 'Years to Rows', 'Months -> Years', 'Clean Countries...', and 'Indicators+Indi...'. A 'Clean 1' step is also shown. A circular callout with a plus sign icon is positioned over the 'Indicators+Indi...' step. At the bottom, a progress bar shows '100%' completion. Below the screenshot, a text box reads: 'Use Tableau Prep to better understand the relationships in your data'.

**Connect to any data source.**  
Explore our library of connectors on the [Tableau Exchange](#) and start connecting to all of your data sources.

Use Tableau Prep to better understand the relationships in your data

**BENEFIT #1**

## Simplify data preparation.

You know what they say about data integrity: Your data analysis is only as good as your data. And sometimes, data can be messy. Customers may have multiple emails or randomly add or drop initials to their names. How do you spot these inconsistencies so you don't misinterpret your customer data?

Tableau helps you easily get your data in a usable state by cleaning and shaping your data for you. With [Tableau Prep](#), you can visually clean, shape, and combine data from various sources before data analysis in [Tableau Desktop](#) or [Tableau Server](#). Equipped with features like data profiling, cleaning, joins, unions, imputation, and data enrichment, Tableau Prep streamlines the data preparation process so your data is ready for analysis and visualization.

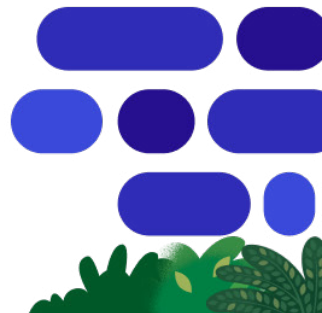
Once your data is in good shape, you can choose among three views: row-level data, profiles of each column, or the entire data preparation process view. You can see immediate results from any view when you edit data—even across millions of rows.

The impact of your edits becomes evident at a glance. Need to undo an edit? Not a problem. Tableau gives you the freedom to reorder steps and experiment. And speaking of millions of rows of data, Tableau can store it all—without the risk of data becoming corrupt over time.



### **Analyze your Salesforce data in Tableau.**

With [Data Cloud for Tableau](#), you can connect to unified customer data from your Salesforce instance, making it easy to discover customer insights.



## BENEFIT #2

## Analyze your data from every angle.

Data is knowledge—if you have the right tools to analyze it. Tableau’s user interface encourages users to play with the data and experiment with different approaches and visualizations to discover insights and forecast trends.

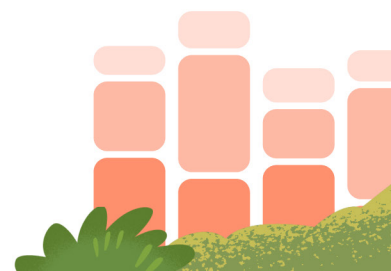
### Create drag-and-drop dashboards.

Intuitive drag-and-drop interfaces are at the core of Tableau, making dashboards easy to create. You can choose from numerous filters and dropdowns to look at your data from different angles and find answers to your most important business questions.

Imagine you’re looking at all of the customers at your international bank. How big is the sample? Can you dial into a more specific data set—say, users of mobile banking services in towns under 10,000? Or would expanding your set to include mobile banking users in small and mid-sized cities provide a better view?

Stay curious and iterate, iterate, iterate until patterns emerge. For example, you can change the date range of your analysis to see different trend lines so you can plan appropriately for historically slow quarters or end-of-year booms.

As you analyze your data, explore all of the different data visualization options. Tableau data visualizations (or vizzes) are optimized to handle new and changing data, and Tableau suggests fresh and relevant vizzes to help you get started. Remember, choosing a pie or a bar chart isn’t always the right choice. Your data might work better visualized as a heat map, scatter plot, Gantt chart, or bubble chart. Utilizing multiple types of vizzes with varying colors makes it easier to see the complete picture and get to the bottom of questions that standard reports can’t address.

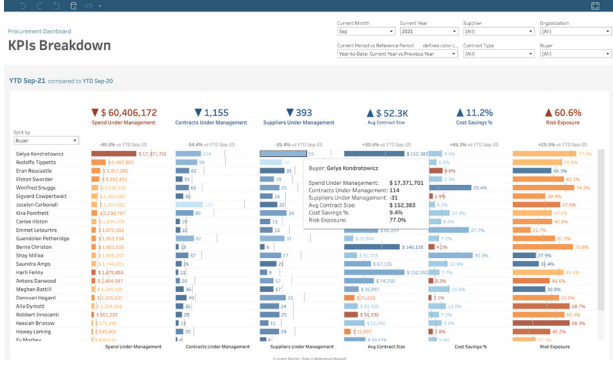


BENEFIT #2

Let's take a closer look at three types of vizzes.

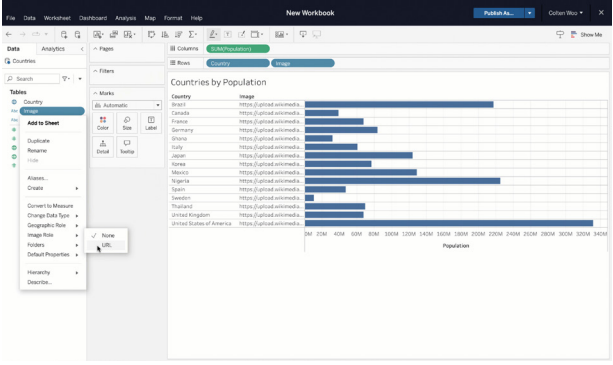
Bullet Graphs

Use bullet graphs to track progress toward multiple goals with minimal space. Vertical bars represent each data set's goal, while two colors indicate whether each set has met its goal making it easy to analyze and read.



Embedded Images

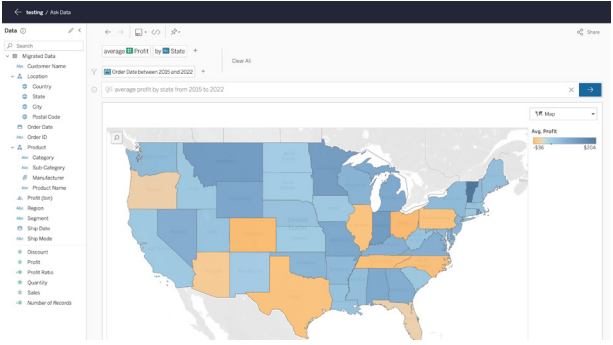
Images are a powerful tool when analyzing data. With Image Role, you can easily link images to your data and sort them into exportable rows and columns. Plus, these images can be externally managed to keep storage costs down and workbook size manageable. Using images instead of product names or item codes is an easy way to make your vizzes more user-friendly.



In this view, instead of looking at the country name, flag icons give you a visual clue to understand your data at a glance.

Geospatial Maps

Maps are a great example of a data visualization that isn't standard in Excel. You can look for trends geographically with custom geocoding and location insights. Try using geo-hierarchies to add layers to your map so you can examine your organization's data through different lenses. Or use spatial joins to combine or link two datasets based on their geographical or spatial features.



Visualize your data with maps to easily understand geographical nuances.

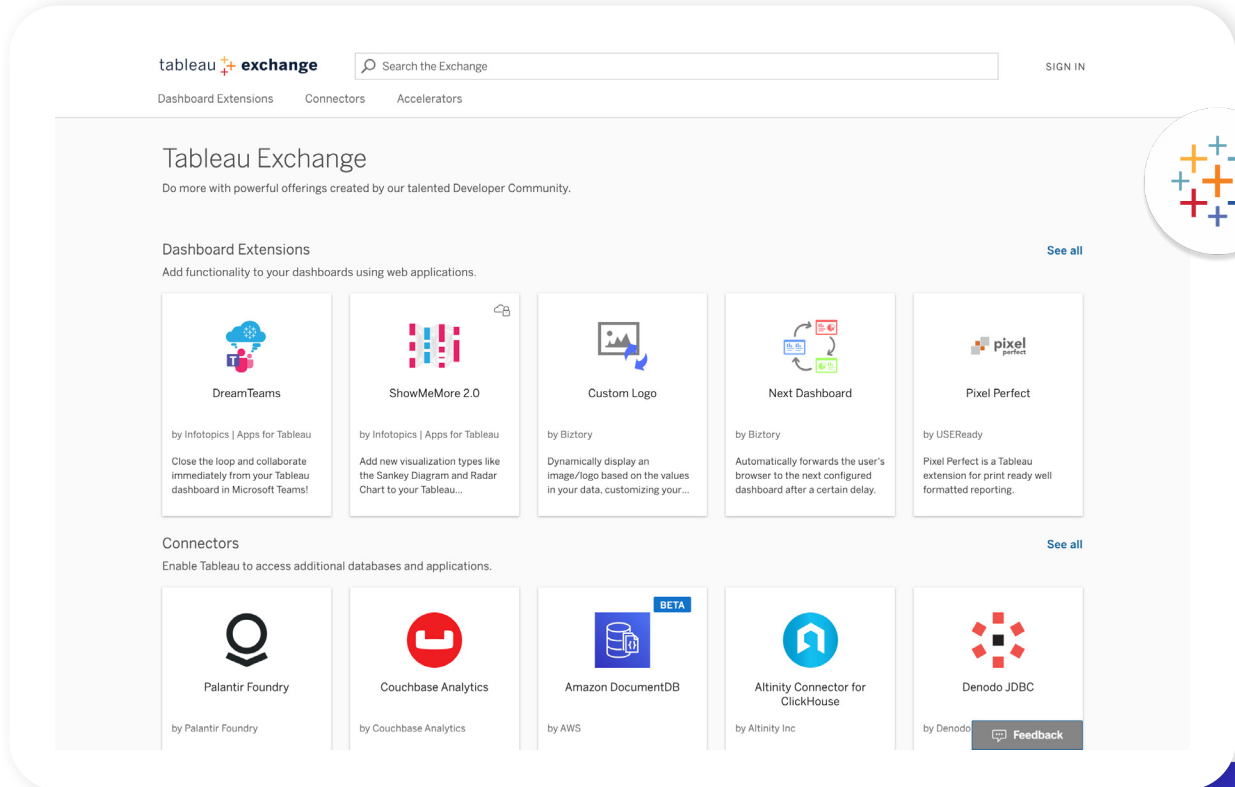
## BENEFIT #2

## Use Tableau for calculations.

Tableau allows you to use calculations to create new data from your existing data, plus perform computations. With calculations, you can dive deeper to dissect and understand trends or create custom metrics based on your initial exploration. Try [table calculations](#) to transform values to fit your needs, whether that's showing car models ranked by overall sales, running totals of car model sales, or one model's percentage of total car sales. By setting specific dimensions, you can fine-tune your calculations before you build your viz.

## Jumpstart your analysis with Tableau Accelerators.

If you need insights fast and don't have time to build a viz from scratch, try plugging your data into an [Accelerator](#)—a ready-to-use and fully customizable dashboard. Accelerators address use cases across 100+ functions, industries, and business applications, whether you're interested in loss prevention stats for a line of retail stores or identifying top-performing agents within a call center. You can browse all available [Accelerators](#) on the Tableau Exchange.



The screenshot displays the Tableau Exchange interface. At the top, there is a search bar labeled "Search the Exchange" and a "SIGN IN" link. Below the search bar, there are navigation tabs for "Dashboard Extensions", "Connectors", and "Accelerators". The main content area is titled "Tableau Exchange" and includes the tagline "Do more with powerful offerings created by our talented Developer Community." The page is divided into two main sections: "Dashboard Extensions" and "Connectors".

**Dashboard Extensions:** This section is titled "Add functionality to your dashboards using web applications." and features five cards:

- DreamTeams:** by Infotopics | Apps for Tableau. Description: "Close the loop and collaborate immediately from your Tableau dashboard in Microsoft Teams!"
- ShowMeMore 2.0:** by Infotopics | Apps for Tableau. Description: "Add new visualization types like the Sankey Diagram and Radar Chart to your Tableau..."
- Custom Logo:** by Biztory. Description: "Dynamically display an image/logo based on the values in your data, customizing your..."
- Next Dashboard:** by Biztory. Description: "Automatically forwards the user's browser to the next configured dashboard after a certain delay."
- Pixel Perfect:** by USEReady. Description: "Pixel Perfect is a Tableau extension for print ready well formatted reporting."

**Connectors:** This section is titled "Enable Tableau to access additional databases and applications." and features five cards:

- Palantir Foundry:** by Palantir Foundry.
- Couchbase Analytics:** by Couchbase Analytics.
- Amazon DocumentDB:** by AWS. Marked as "BETA".
- Altinity Connector for ClickHouse:** by Altinity Inc.
- Denodo JDBC:** by Denodo. Includes a "Feedback" button.

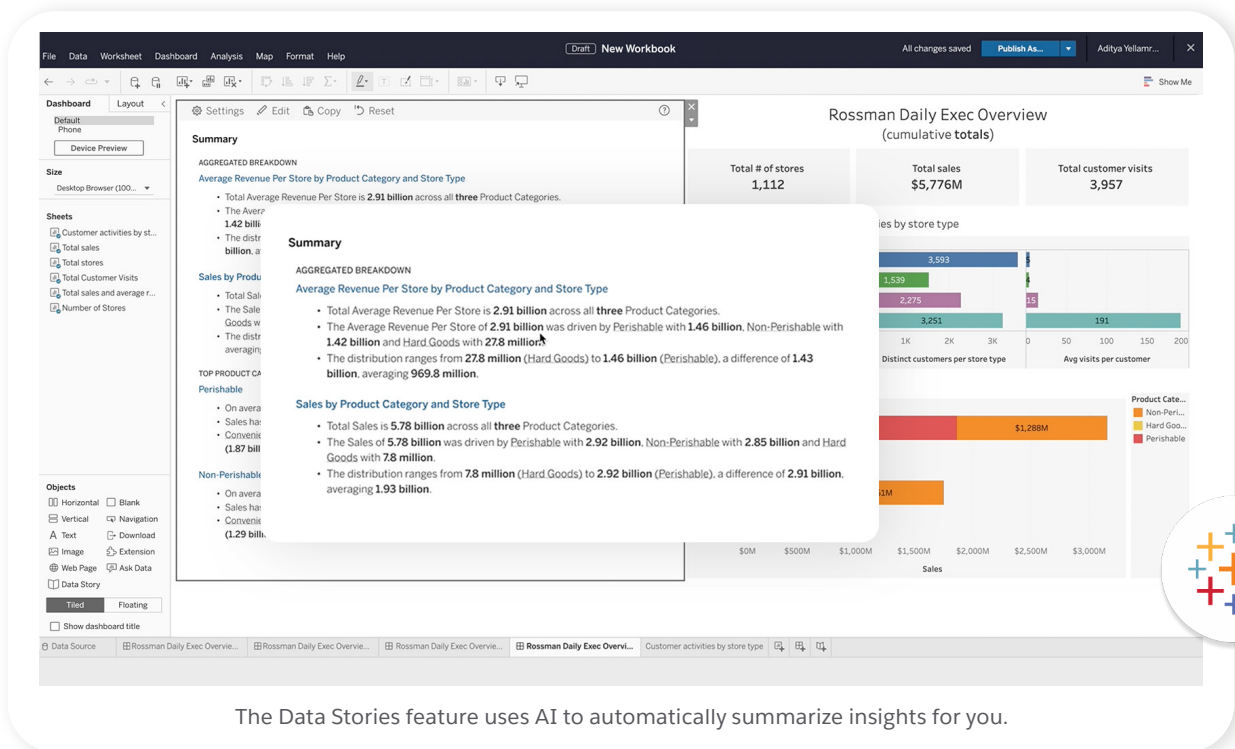
A circular logo with a grid of plus signs in various colors is positioned on the right side of the screenshot.



## BENEFIT #2

## Enhance your visualizations with natural language.

Say goodbye to writing time-consuming executive summaries of your dashboards—plus the inevitable rewrites whenever the data is updated. [Tableau Data Stories](#) use artificial intelligence to generate meaningful insights and narratives from data visualizations, making data consumption more accessible and engaging. You can even customize the language to include relevant business-specific metrics so it's easier for business users throughout your organization to understand. And as you browse through different vizs to find the best one, the stories dynamically adjust as you go.



## Predict trends.

Everyone wants a crystal ball to see into the future. With Tableau forecasting and predictive modeling, you get the next best thing. Take advantage of your existing data to predict business growth, customer behaviors, and more.

Tableau uses a process called exponential smoothing to generate forecasts from your existing data. You can add a trendline for forecasting data to your chart with just a click of your mouse. And when it comes to forecasting, you have options: Use Tableau's automatic model—ideal for most views—or specify an additive or multiplicative model that's better for data involving trends or seasons.

## BENEFIT #3

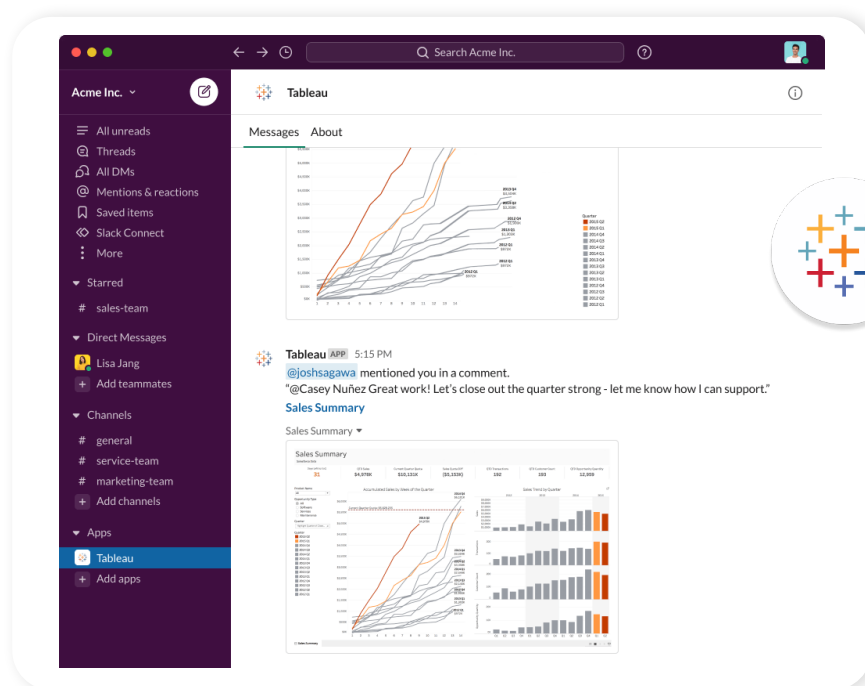
## Empower your stakeholders with data and insights.

Data siloed is data wasted. Tableau enables data democratization across your organization in a secure and trusted way, so anyone—no matter their skill level—can unlock new insights and create the next big idea to drive business growth.

### Share your findings.

With Tableau, your data is centrally available on the web, so there's no need to send out locked spreadsheets for fear of contaminating data. Simply publish and share data visualizations with your teammates and stakeholders, so they can engage with the dashboard and try out new visualizations, explore follow-up questions, and share new insights they discover.

One of the biggest benefits of sharing insights in Tableau is that you'll never have to worry about your team looking at outdated data and insights. Tableau updates dashboards automatically through live connections to data sources, enabling real-time access to the latest data. Plus, you can schedule regular data extracts at specific intervals to keep dashboards up to date, so you can be sure the users you're sharing with can see the most recent data available.



The screenshot shows a Slack interface for a channel named 'Tableau' within 'Acme Inc.'. The channel contains a message from the 'Tableau APP' at 5:15 PM. The message content includes:

- A line chart visualization showing data trends over time.
- A text message: "@joshagawa mentioned you in a comment. @Casey Nuñez Great work! Let's close out the quarter strong - let me know how I can support."
- A link to a 'Sales Summary' dashboard.
- A preview of the 'Sales Summary' dashboard, which includes a table with columns for 'Sales Summary', 'Q1', 'Q2', 'Q3', and 'Q4', and a bar chart below it.

A circular icon with a plus sign and a grid of dots is overlaid on the right side of the screenshot.

**BENEFIT #3**

With Tableau it's easy to stay in the flow of work because your team can share visualizations in Slack. Set alerts within Slack to automatically notify you when someone mentions you in a viz comment, an asset is shared with you, or your data meets a predetermined threshold.

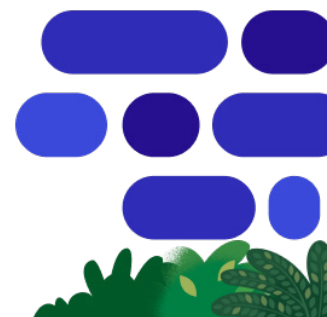
**Empower everyone on your team to do more with artificial intelligence.**

You don't have to be a data expert to find business insights—AI can help. Tableau Pulse empowers data consumers with personalized, contextual data and insights right in the flow of work. It anticipates questions and helps users decide what to do next.

[SEE TABLEAU PULSE IN ACTION](#)**Make real-time changes while presenting.**

We've all been there: You get to a meeting, and people have new questions that your initial data analysis and chart don't address. Why are trucks in Texas moving slower than trucks in all our other locations? Is there more traffic there? Is the type of truck a factor? You'll need to create a different data visualization to address their questions—which means another meeting.

Sound familiar? It doesn't have to be this way. With Tableau, you can create interactive presentations and respond to follow-up questions by adjusting the view in real time. Interactive dashboards with a current data feed allow you to filter views, adjust parameters, perform quick calculations, and drill down to examine underlying data during the meeting.



# Do more with Tableau, now more powerful than ever with AI.

To keep pace with the speed of business innovation and customer demands, your organization needs access to real-time data and insights. It's time to free yourself from the restrictions of static spreadsheets and charts and discover a whole new world of data exploration, insights, and interactivity.

Tableau's AI-powered business intelligence tools help democratize data by providing organizations with interactive visualizations and easy-to-consume data and insights at scale. With Tableau, everyone is empowered to make better business decisions. **Start your free trial today at [tableau.com/trial](https://tableau.com/trial).**

## Additional Resources

[RESOURCES FOR ANALYSTS](#)

[JOIN THE TABLEAU COMMUNITY](#)

[TRY TABLEAU FOR FREE](#)





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 provides businesses with a shared view of their customer data—giving every department access to the most powerful, comprehensive, and intuitive analytics features embedded directly into workflows.