



Ready to go cloud. What now?

6 strategies for transitioning
to the cloud

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Introduction

From flexibility and scalability to more predictable operating expenses, the many permutations of the cloud have something to offer nearly every organization. Most organizations today have employed a hybrid strategy, involving a mix of on-premises and cloud infrastructure and technology, and more often than not, a multi-cloud strategy spanning several public cloud environments or a mix of public and private clouds.

In fact, [Flexera's 2021 State of the Cloud report](#), which surveys technical professionals representing a cross-section of global organizations, found that:

- Nearly 60% of respondents say they use the cloud heavily and have advanced-level cloud maturity, with another 21% of organizations reporting intermediate-level cloud maturity;
- 92% of enterprises have a multi-cloud strategy and 80% have a hybrid cloud strategy, combining the use of both public and private clouds.

And with the global COVID-19 pandemic, we've witnessed organizations accelerating their cloud adoption and data-driven digital transformation efforts to better support distributed workforces, enable greater organizational agility, and ultimately increase business resilience. A cloud migration is a great opportunity to integrate data and analytics more with more pieces of your business.



Organizations will focus on business resiliency to weather the economic downturn with technologies that allow them to automate and scale, while also positioning their organizations for the next normal. U.S. organizations are particularly focused on business resiliency with 71% reporting this as a top or high priority.”

— MEREDITH WHALEN, CHIEF RESEARCH OFFICER, IDC

Source: IDC, [Survey Spotlight: COVID-19 Brings New C-Suite Priorities](#), May 2020

When you're ready to make the move to the cloud, or in the early stages of your migration, you may wonder—what's next?

It doesn't all need to happen at once. Your best strategy may be to start by solving a specific problem or taking advantage of a good opportunity. What new approaches will you adopt in the cloud? What technologies or processes will you sunset and transition to the cloud in the next incarnation? What systems can remain as they are to satisfy your evolving business needs?

However you choose to embrace the cloud, it's critical to have a plan. To help provide some guidance, we've structured this paper with six questions to explore as you consider your journey to the cloud. In doing so, you'll have more confidence in your approach and investments when transitioning to the cloud.

1. What problem are you trying to solve?

Moving to the cloud should be driven by a real business problem, not by an abstract desire to be in the cloud. Remember that cloud services are there to support your business, not to be an all-or-nothing solution. Starting with clear goals will help you have a faster implementation when going cloud, which means you'll get value fast, and you'll be able to start your transition without ripping out something that's working.

For example, many organizations look to cloud technologies to reduce IT overhead. [Red Hat](#) recognized this opportunity while implementing an analytics platform that could connect to all its data sources, ensure agile performance, and enable cloud-based collaboration. After choosing Tableau Online, a fully hosted cloud BI solution, Red Hat eliminated the need to manage upgrades and server maintenance, while also supporting users worldwide with streamlined BI. Now, Red Hat's cloud-based solution reduces strain on staffing, time, and financial resources caused by hosting data on-premises.

2. How can the cloud enable you to do things differently?



One of the major advantages of cloud services is that they offer a completely new way of doing things, whether in capabilities or pricing. If you've decided to move a system to the cloud, don't just replicate what you already have. Rather than a "lift and shift" approach, think of migration as an opportunity to "move and improve," including how you can leverage flexible pricing, elasticity, and instant provisioning.

Cloud data warehouses are one example of new approaches to old problems. Systems like Snowflake, Amazon Redshift, and Google BigQuery can be set up in minutes, as opposed to weeks, and can scale to fit the size of your data. These technologies are optimized for analytics and they offer a path to insight from big data from devices, social media, or machine systems.

"Snowflake and Tableau are a great match for young, cloud organizations like [Huel](#)," explained data scientist Jay Kotecha. "Both technologies deliver performance and simplicity. Tableau connects automatically to Snowflake without any additional coding or legwork, so setup is quick and easy, and we can scale alongside the business."

Another example is the data lake, a large data repository that allows analytical tools to connect to raw data as it is, instead of forcing the data to fit a certain format first. With faster, more flexible data ingestion and storage, many organizations use data lakes to explore new use cases for data before establishing formal pipelines to transform, prepare, and share the data broadly with business users.

3. How are you strategically planning for growth?

By decoupling storage and compute resources from physical hardware the cloud introduced revolutionary elasticity. With attractive, on-demand pricing, you can scale resources up and down easily, making ingesting, storing, and processing data much more cost-effective. However, limitless elasticity means your spending has the potential to increase quickly with growth.

In planning for growth, it's helpful to spend some time up front to get your most mission-critical systems working as you want them before you scale them significantly. Whether they be cloud applications, data pipelines, or analytics, the goal is to include strategies for managing growth in your cloud migration and optimization planning, so you aren't stuck with early mistakes.

For example, you may be able to scale up your data collection overnight in the cloud—but if you’ve set up the wrong schema for collecting it, you’ll have a lot of fixing to do. If your business starts growing, a good system can go a long way with you—but a bad one will only add to your headaches.

Keep in mind that your best architecture today may not be your best architecture in a year, or even six months. Luckily, the cloud allows for rapid evolution—as long as you can plan for it. And this ties directly into our next topic.

4. What flexibility for iteration does your cloud strategy allow?




One of the greatest benefits of analytics in the cloud is the ability to spin up and test new solutions quickly at much lower costs. This gives you the freedom to try things, fail quickly, and move on to something else. There’s not a lot of setup required as there has been in traditional models, nor are there the same concerns around storage limits, cluster overhead, or performance—you’re able to prototype as you go, and add volume when you’ve got it right.

In 2020, [Experian](#) built a powerful analytics tool to help public organizations use demographic data to pinpoint and protect vulnerable communities from COVID-19. Sarah Robertson, product director, explained, “We wanted it to be fully scalable, which we could achieve very easily by deploying Tableau in an Amazon Web Services (AWS) environment. Another key factor was speed to market.” Her team was able to take the new solution from concept to market in just two weeks.

As you consider new services, take advantage of flexibility in the cloud. Keep an eye on new technologies and see how you can fit them into your workflows—including AI, machine learning, and data science applications. Having some budget and resources dedicated to experimentation and trying new things will help your organization to find innovative solutions and more ways to manage costs in the long run.



5. How will you give your users a great experience in the cloud?




The cloud offers many amazing benefits for IT, but also empowers IT to pass on great benefits to business users. When cloud solutions fit and add value to people's workflows, you're more likely to see increased adoption, engagement, and better business outcomes.

Dana Greenlaw, analytics manager for [Specialized Bicycle Components](#), reflected on the value they've realized by adopting Tableau Online for improved global cloud analytics and reporting: "Adoption was organic and fast because we could steer all remote teams toward Tableau as a common solution. If centralized access to data can help us reach more people and run our business more efficiently, that means we have the resources to help our customers get the most out of their purchases, while we also find new ways to fulfill our mission."

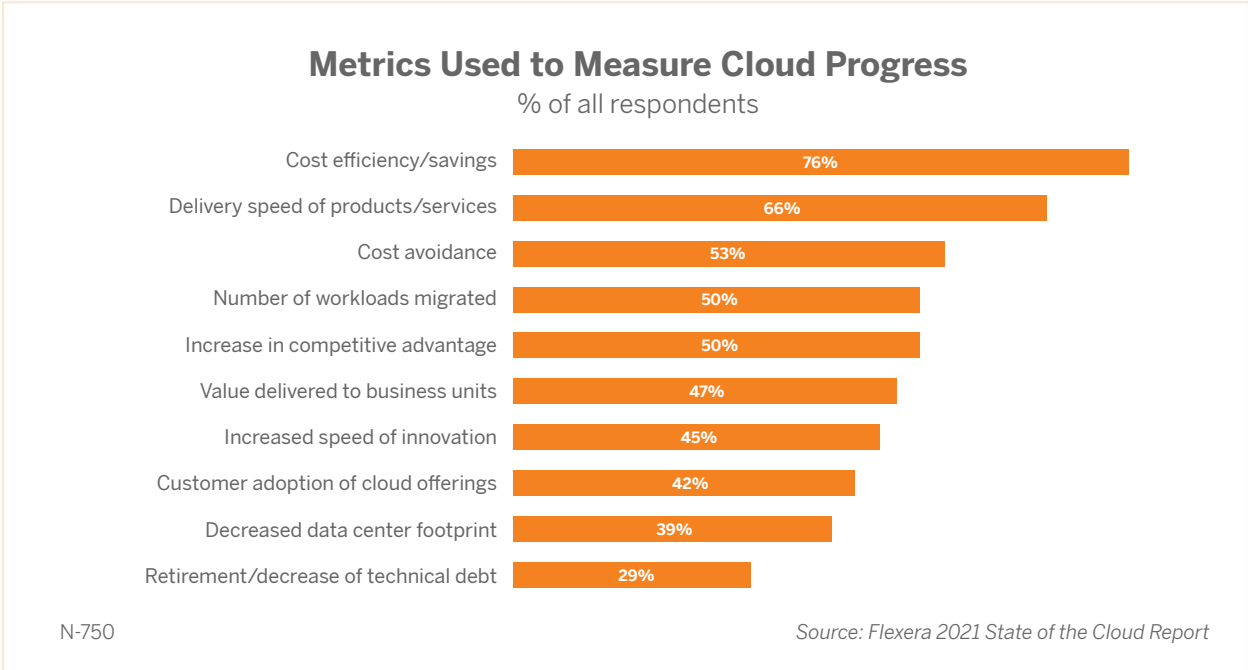
A major benefit of data and applications in the cloud is enabling anytime, anywhere access that's both secure and delightful for users. Which applications would be more valuable if you integrated them into the flow of business. Could you give your sales team mobile access to the CRM system, or recruiters access to the HR system for when they're at events? And when accessing data and applications, can you provide a single sign-on solution with multi-factor authentication to keep the experience simple and secure? For this reason, many organizations gravitate toward solutions that use SAML or OAuth technologies.

While the cloud allows for a lot of useful integration, it's important to think about the ways you can provide a great end-to-end user experience, integrated right into people's workflows. For example, as organizations manage a proliferation of data, giving users access to an integrated data catalog can help them find, understand, and trust the right data that's relevant for decision-making in their roles.



6. How will you measure and create continued value?

Moving to the cloud and embracing new capabilities and processes shouldn't be considered a final destination—instead, you should approach your cloud efforts as an ongoing journey, centered around enabling your people. This means placing people over process, throwing away all-or-nothing milestones, and embracing incremental improvements to deployment plans. You won't see much value by throwing a modern cloud solution at your workforce (or rapidly expanding its use) without careful consideration to what ongoing success looks like, and thoughtful change management to help people adopt and adapt.



At Tableau, we work with organizations every day to modernize their BI and analytics efforts across the organization. To help our customers get alignment on their strategy and goals, establish and measure agile practices, and increase their teams' capabilities, we created a step-by-step methodology called Tableau Blueprint.

A holistic approach like [Tableau Blueprint](#) allows you to zoom out to see the big picture of what's ahead, and zoom in on a specific area to fine tune and improve at any point along your journey. And while we created Blueprint to help organizations broadly adopt modern analytics, there are countless themes and best practices that can be applied to a cloud journey as well. We hope you'll check it out, because wherever you are in your migration to the cloud, we are here to help.



About Tableau

Tableau is a complete, integrated, and enterprise-ready visual analytics platform that helps people and organizations become more data driven. Whether on-premises or in the cloud, on Windows or Linux, Tableau leverages your existing technology investments and scales with you as your data environment shifts and grows. Unleash the power of your most valuable assets: your data and your people.

Additional resources

Resource hub: Data and analytics in the cloud

Whether you're modernizing your analytics, planning a cloud migration, or ready to optimize your cloud investments, we have resources to help you in your cloud journey.

[Visit the hub](#)

How data gravity is pulling your analytics to the cloud

Cloud computing can help you quickly and easily ingest, store, analyze, and share data, but it's important to understand data's tendency to attract applications and services to where it's stored.

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Tableau Online scalability: Overview and proof points

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