



Communications Templates

Jump start your Tableau Data Doctor practice with templates for promotion and patient communication!

Promotional emails

Email option 1 – Themed, open office hours

Subject *{{Theme topic}}* Data Doctor

Body The Data Doctor is in! Meet with a Tableau expert who can help you understand the ins and outs of *{{theme topic}}*. We will explore *{{theme topic}}* in depth using *{{common workbook/concept}}* and then provide time for questions.

Bring your favorite workbook or data set to follow along, apply the skills used, and ask questions about your specific work.

Join *{{Theme topic}}* Data Doctors in *{{location}}* from *{{start time}}* to *{{end time}}*. Please be sure to RSVP and arrive early as seats go quickly!

Meet your Data Doc!

{{Data Doctor photo}}

{{Data Doctor Bio – Tenure & role at organization. Areas of expertise. Special skills, hobbies, interests. Etc.}}

Email option 2 – Free form, open office hours

Subject *{{Organization}}* Data Doctor

Body The Data Doctor is in! Meet with a Tableau expert who can help you solve technical challenges, learn about free help resources and training, master advanced tools, and get your vizzes and dashboards in tip-top shape.

Bring your questions, a favorite workbook, or data set and meet with a Data Doctor for *{{time length}}* minute/hour appointment!

Data Doctors will be available in *{{location}}* from *{{start time}}* to *{{end time}}*. Drop by any time!

Meet the Data Docs!

{{Data Doctor photo}}

{{Data Doctor Bio – Tenure & role at organization. Areas of expertise. Special skills, hobbies, interests. Etc.}}



Email option 3 – Free form, pre-scheduled appointments

Subject	The Data Doctor Is In!
Body	<p>Data Doctor is your opportunity to go one-on-one with a Tableau expert who can help you solve technical challenges, learn about free help resources and training, master advanced tools, and get your vizs and dashboards in tip-top shape.</p> <p>Data Doctors will be available in <i>{{location}}</i> from <i>{{start time}}</i> to <i>{{end time}}</i>.</p> <p>To schedule an appointment, <i>{{appointment scheduling instructions or link}}</i>. Appointments are scheduled in <i>{{time length}}</i> minute/hour sessions.</p> <p>Please bring <i>{{your workbook, laptop, etc.}}</i> with you to your appointment.</p> <p>Meet the Data Docs!</p> <p><i>{{Data Doctor photo}}</i></p> <p><i>{{Data Doctor Bio – Tenure & role at organization. Areas of expertise. Special skills, hobbies, interests. Etc.}}</i></p>

Email option 4 – Free form, pre-scheduled appointments

Subject	<i>{{Organization}}</i> Data Doctor
Body	<p>The Data Doctor is in! Meet with a Tableau expert who can help you solve technical challenges, learn about free help resources and training, master advanced tools, and get your vizs and dashboards in tip-top shape.</p> <p>Bring your questions, a favorite workbook, or data set and meet with a Data Doctor for <i>{{time length}}</i> minute/hour appointment!</p> <p>Data Doctors will be available in <i>{{location}}</i> from <i>{{start time}}</i> to <i>{{end time}}</i>. Drop by any time!</p> <p>Meet the Data Docs!</p> <p><i>{{Data Doctor photo}}</i></p> <p><i>{{Data Doctor Bio – Tenure & role at organization. Areas of expertise. Special skills, hobbies, interests. Etc.}}</i></p>



Tableau Data Doctor



Email Option 5 - Announcing launch of both chat channels

Subject *{{Organization}} Data Doctor Chat Channel is now Live!*

Body The Data Doctor is in! Get help and advice from a Tableau expert who can help solve technical challenges, learn about free help resources and training, master advanced tools, and get your vizzes and dashboards in tip-top shape.

Bring any questions you have to the *{{channel name/link}}*. Please visit the Channel FAQ *{{link}}* for tips on how to ask a question and other help resources.

We have also launched a separate channel dedicated to important announcements and updates about Tableau in *{{Organization}}*, please join *{{channel name/link}}* to keep up to date.

Meet the Data Docs!

{{Data Doctor photo}}

{{Data Doctor Bio – Tenure & role at organization. Areas of expertise. Special skills, hobbies, interests. Etc.}}

Promotional signage



Data Doctor



{{Date}}

{{Location}}

{{Time(s)}}

Data Doctor is your opportunity to go one-on-one with Tableau experts who can help you solve technical challenges, learn about free help resources & training, master advanced tools, and get your vizzes and dashboards in tip-top shape.

Appointments available in {{time length}} minutes/hour sessions.

Contact {{email contact}} with your preferred appointment time.



Promotional signage

Data Doctor



{{Date}}
{{Location}}
{{Time(s)}}

Data Doctor is your opportunity to go one-on-one with Tableau experts who can help you solve technical challenges, learn about free help resources & training, master advanced tools, and get your vizzes and dashboards in tip-top shape.

Appointments available in {{time length}} minutes/hour sessions.

Contact {{email contact}} with your preferred appointment time.



Chat Promotional Signage

Data Doctor



{{Chat Channel Name & Link}}

The Data Doctor Chat Channel is your opportunity to get assistance and advice from Tableau experts who can help you solve technical challenges, learn about free help resources & training, master advanced tools, and get your vizzes and dashboards in tip-top shape. Please visit the Channel FAQ [{{link}}](#) for tips on how to ask a question and other help resources



Directional signage

Data Doctor



{{Date}}
{{Location}}
{{Time(s)}}

The Doctor Is In

Directional signage



Data Doctor



Appointment Check-In



Appointment confirmation email

Subject The Data Doctor is IN. Confirm your appointment

Body Hello *{{patient name}}*,

Shelve the daily apples for now – this is a Doc you'll want to meet. We've confirmed your Data Doctor appointment. Accept this invitation so we know you've received it.

How to check-in for your "check-up":

- ☒ **Be an early bird.** Arrive at the Front Desk 5 – 10 minutes beforehand.
- ☒ **Be curious.** Have a list of topics to address and inquires to explore.
- ☒ **Be prepared.** Bring all the devices and data necessary to delve in.

Please find your appointment details below:

To cancel your appointment, *{{cancellation instructions}}*.

Questions, comments? Our Data Doctor Front Desk is available for your inquiries. More pressing concerns can be sent to *{{contact email}}*.

Appointment prescription email

Email option 1 – Themed, open office hours

Subject Your Data Doctor Prescription

Body Thank you again for joining us at Data Doctor! Below please find a summary of what we discussed during your appointment.

Issue Summary

{{Brief summary of the issue discussed}}

Solution / Steps Tried

{{Step-by-step instructions to resolve the issue, answer to the question, or troubleshooting steps tried.}}

Next Steps

{{Optional. Not needed if solution was provided. Otherwise, what is the patient's next step to resolve? Is there someone else to speak to? Should they consult the Tableau Community Forums or Tableau Technical Support?}}

Documentation

{{Notes on any reference documentation used – links to websites, Tableau Community Forums, Tableau Training Videos, Tableau Knowledgebase or Online Guides, or internal organizational documentation.}}

Keep this message in a place where you can easily reference it and please let me know if there are any additional questions about any of the above.

Thank you again for stopping by today!