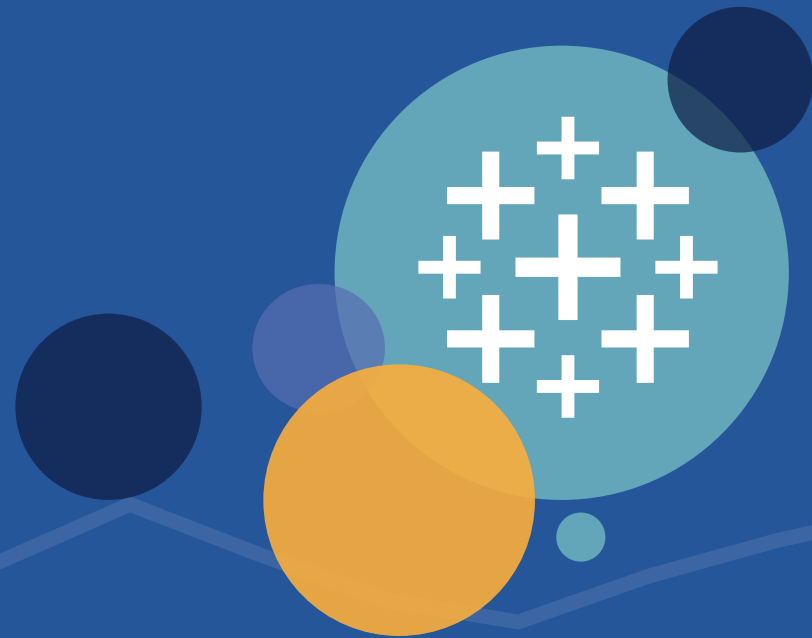




Convince your boss that Tableau is right for your team

You've found an analytics platform
that you love – here's how to convince
your boss to buy it.



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value you could provide if you didn't need to spend so much time wrangling insights from complicated and maybe even outdated tools.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

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.



1



They want to make better decisions based on 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

As the business world bends towards 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 modelling 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 visualisation without stopping the flow of analysis



Use AI-driven statistical modelling

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

Get started in minutes.

[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



Tableau tip

Get vizzing! Use the Tableau free trial to make a powerful, interactive visualisation 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.

2






They want to share knowledge across your organisation

“UNC is creating new internal partnerships that didn’t exist before [COVID-19], and Tableau is great for building those partnerships because it’s enterprise-ready. Analysts across UNC Health are using it.”

— **Chris Paolini, Health System BI Analyst, UNC Health**

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 web page.
-  **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.

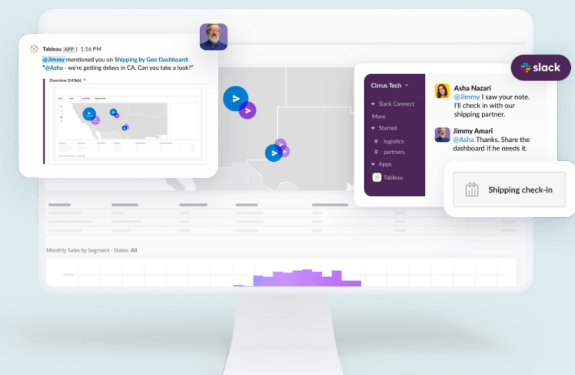
With Tableau for Slack, you can:

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.



3

They want to create a data culture

“My a-ha moment that we had 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, Vice President Of Business Strategy and Analytics, Seattle Seahawks**



Data Culture is the realisation 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 organisation.

Read the white paper

Organisations 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 organisations, May 2021,
<https://www.tableau.com/en-gb/learn/whitepapers/idc-data-culture>

To help Tableau customers along their data culture journey, we've curated recommendations from thousands of customers into these tools:



Tableau Blueprint, the most comprehensive methodology for building a data-driven organisation



Data Culture Playbook, actionable guidance for business leaders who want to establish the foundational behaviours and mindsets needed to build a resilient, data-driven organisation



Data Literacy for All, a free eLearning program that provides data skills fundamentals, regardless of skill level



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?



4

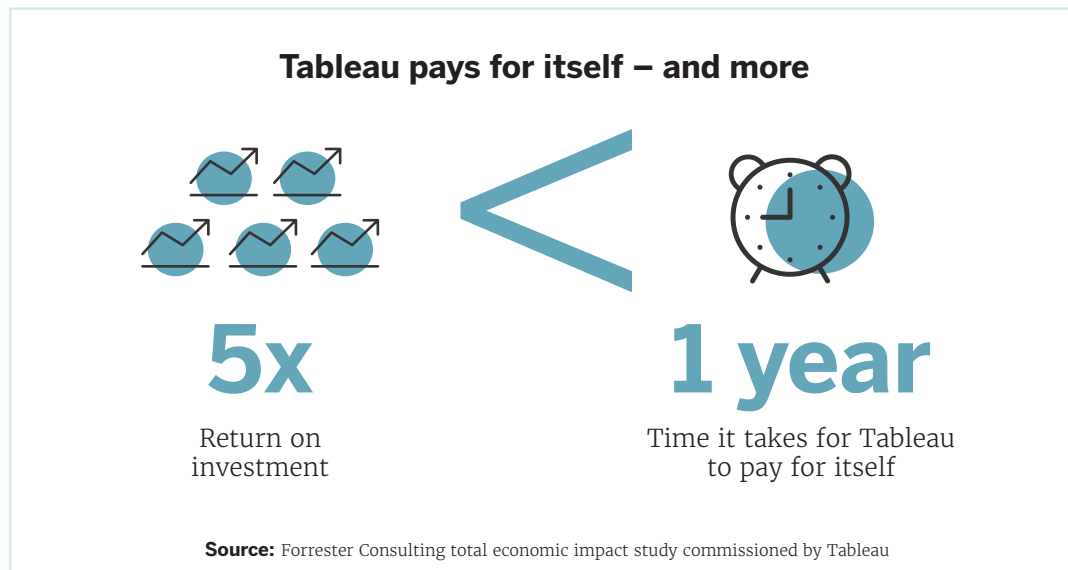
They want to get value for their money

“Earlier we spent 70% of the time on data extraction and all the drudge-work, 30% on analytics. Now that’s just the opposite, which means it’s a direct P&L impact in terms of the business decisions that you can drive.”




— **Preetham Shanbhag, Senior Director, FP&A Operations and Transformation Operations, Honeywell International**

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 prioritise 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:

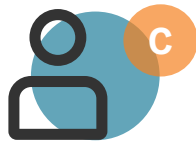
-  Supported ongoing journey to a data-driven company culture
-  Anticipated needs and tailored programmes to customers
-  Enabled collaboration and continued innovation in data analysis

Pricing for data people

People need access to data to do their jobs better, but their relationship with data can differ. Tableau's role-based licences allow you to deploy data broadly across your organisation 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 visualisations and data sources to their organisation. 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 licences are right for your organisation](#)



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 the model](#)

Worker productivity

Compare gains in worker productivity achieved with different solutions and use the cost of labour to compute a return on your investment.

[Go to the model](#)

Expected impact

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

[Go to the model](#)

5



They want to help everyone on your team succeed

“We now have ‘citizen data scientists’ – any employee in any area can become an expert in their data. Tableau helps them tell stories that showcase their data in new, meaningful, compelling ways.”

— Ian Reed, Manager of Enterprise Analytics, Signet Jewelers

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 catalogue 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



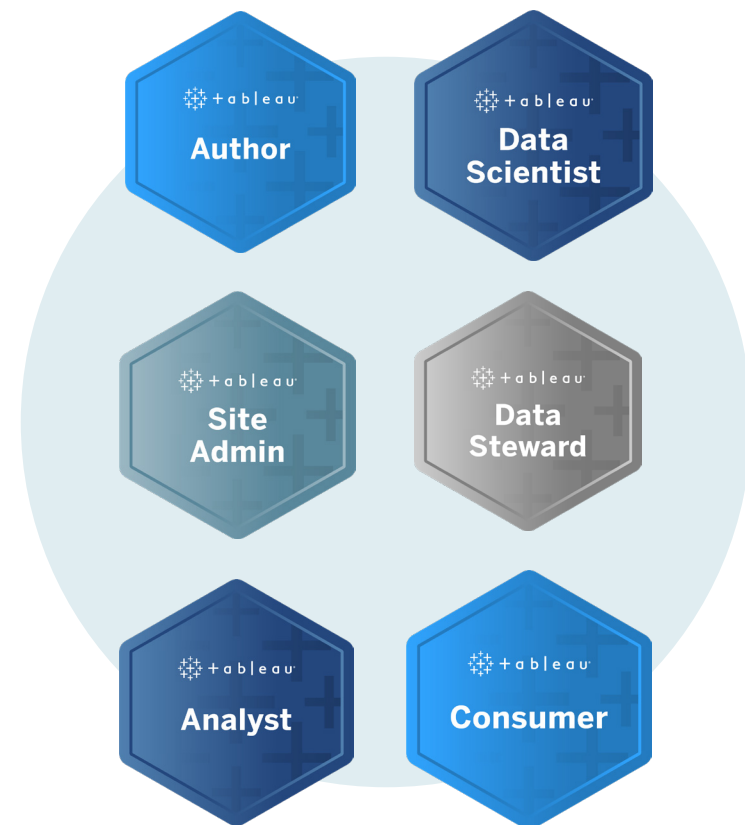
Tableau support and services

Comprehensive, searchable technical support



Tableau Professional Services

Expert Tableau consulting services with a wide array of offerings, including advisory, technical services and change management

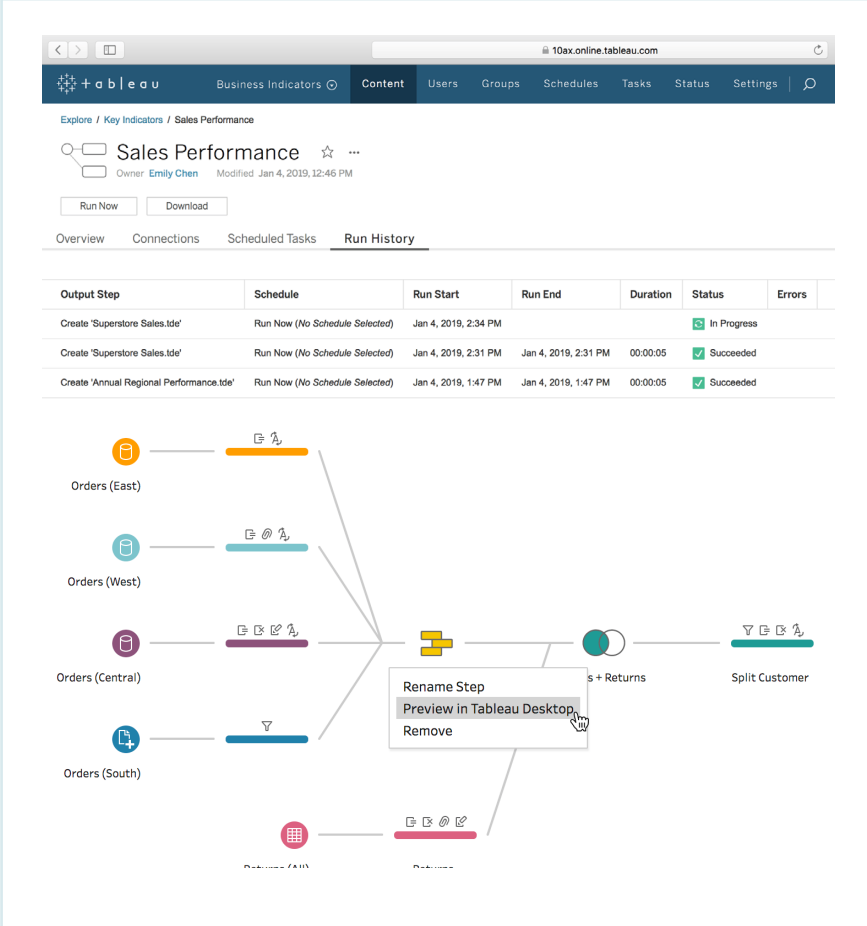


Learning paths by role

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 organisation find relevant, prepared data.



The screenshot displays the Tableau Prep interface. At the top, there's a navigation bar with 'Business Indicators', 'Content', 'Users', 'Groups', 'Schedules', 'Tasks', 'Status', and 'Settings'. Below this, the main content area shows a flow diagram for 'Sales Performance' with steps like 'Orders (East)', 'Orders (West)', 'Orders (Central)', 'Orders (South)', 'Orders (All)', 'Orders (Returns)', and 'Split Customer'. A context menu is open over a step, showing options: 'Rename Step', 'Preview in Tableau Desktop', and 'Remove'. Below the flow diagram is a 'Run History' table.

Output Step	Schedule	Run Start	Run End	Duration	Status	Errors
Create 'Superstore Sales.Idle'	Run Now (No Schedule Selected)	Jan 4, 2019, 2:34 PM			In Progress	
Create 'Superstore Sales.Idle'	Run Now (No Schedule Selected)	Jan 4, 2019, 2:31 PM	Jan 4, 2019, 2:31 PM	00:00:05	Succeeded	
Create 'Annual Regional Performance.Idle'	Run Now (No Schedule Selected)	Jan 4, 2019, 1:47 PM	Jan 4, 2019, 1:47 PM	00:00:05	Succeeded	

Try Tableau Prep for free

What's next?

It's time to persuade your boss! Tableau helps people and organisations 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?

[Contact us](#)





A Salesforce company, Tableau helps people see and understand data. As the world's leading analytics platform, Tableau offers visual analytics with powerful AI, data management and collaboration. From individuals to organisations of all sizes, customers around the world love using Tableau's advanced analytics to fuel impactful, data-driven decisions.

For more information, please visit www.tableau.com.



10 years a leader in
[Gartner's BI & Analytics
Magic Quadrant](#)



DRESNER
ADVISORY SERVICES

Ranked as a top vendor for
[Self-Service BI and Guided
Analytics](#) in Dresner Advisory's
2021 Technology Innovation
Awards



Best Self-Service BI
Tool from [PC Mag](#)

