



How Successful IT Leaders Drive **Data Transformation**

Actionable insights—scaled for the enterprise



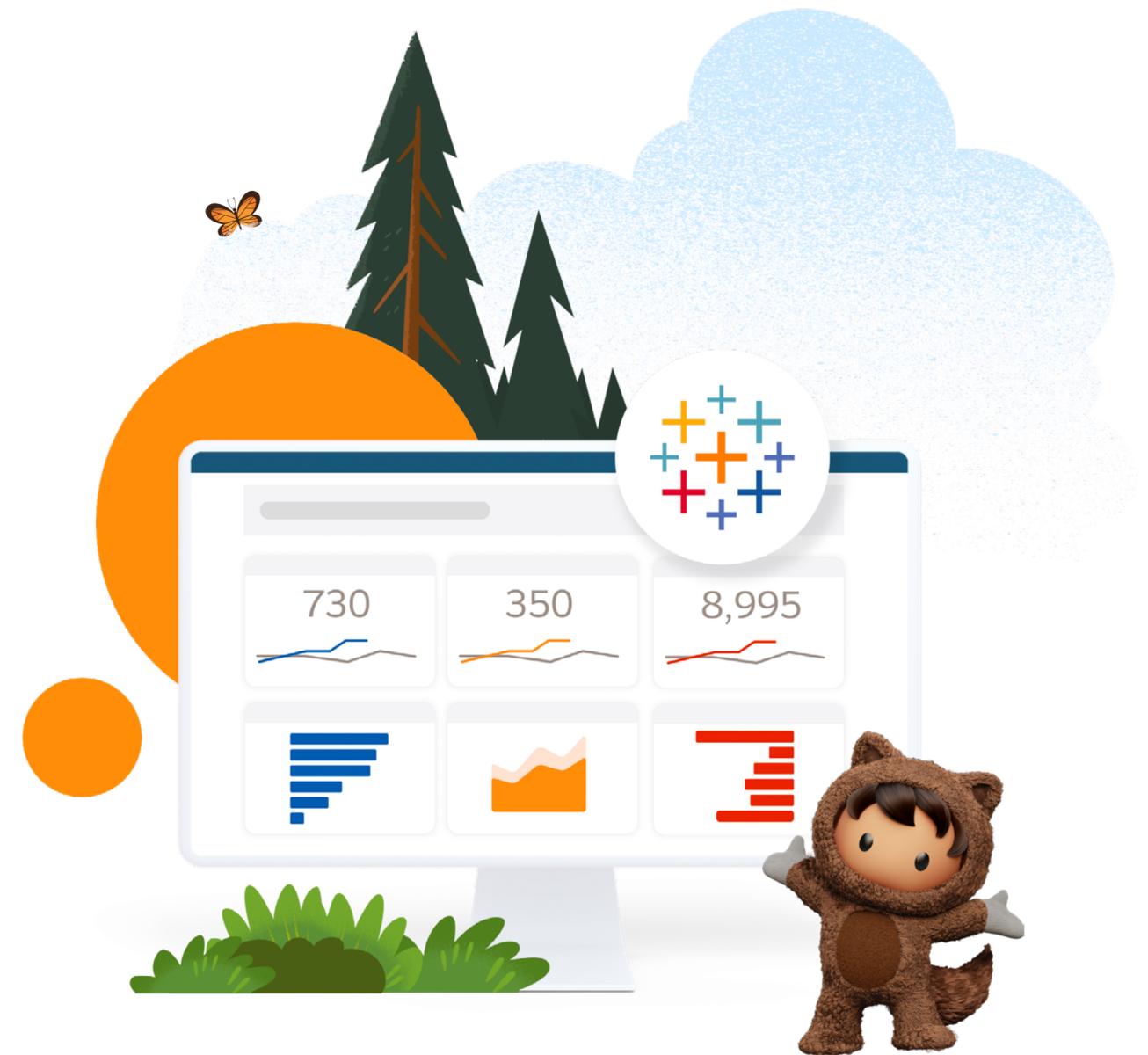
Introduction

In this volatile global business environment, pivoting quickly has become a standard operating procedure, and the pressure for faster decision making is intense. Organizations are looking for ways to reduce costs, increase operational efficiencies, improve employee productivity, and promote customer satisfaction. As leaders look to their data to find answers, it's become increasingly clear that businesses must grow their capacity to deliver self-service data analytics with right-sized governance—or risk falling behind.

The churn of the past few years hit IT departments particularly hard. In addition to rising expectations, they've been left with mounting technical debt, high operational and maintenance costs, and growing security and compliance risks. It could be tempting to launch yet another data migration initiative and lock down security even further.

Instead, successful IT leaders are setting strategies to change their data management and governance practices altogether. While continuing to focus on cost savings and ROI, they are investing in data fabric architectures, simplifying operations, supporting self-service analytics, and now—with the introduction of Salesforce Genie to Customer 360—delivering actionable insights in real time.

After all, meaningful change is fueled by data.



IT—you lead the way forward

Businesses count on IT leaders, like you, to drive data transformation. They need you to stand up new BI tools quickly and efficiently, get data into the hands of everyone who needs it, establish data governance capabilities that scale with the business, manage integrations, and help them build a thriving Data Culture... all while keeping the lights on.

Data transformation won't happen overnight. But you can take this opportunity to become a change agent in your organization and help everyone make better decisions based on data—while also driving cost savings and relieving the pressure on your team. The way forward begins with an enterprise data strategy that makes it easier for you to govern, secure, and scale data analytics.



67%
of organizations

67% of organizations say their automation initiatives are IT-led.

Mulesoft IT and Business Alignment Barometer

Diego Fernando Martínez
Tableau Visionary & Ambassador
CTO

What's inside

We've paired the most common pain points that IT faces today with practical insights and resources. Learn how leaders like you can drive enterprise data transformation by:

- ✓ Implementing a governance framework that delivers trusted data securely
- ✓ Increasing organizational agility with self-service analytics
- ✓ Building value with actionable insights from an AI-driven, enterprise-ready analytics platform

Plus, more resources to help you drive data transformation.

Govern and manage data at scale

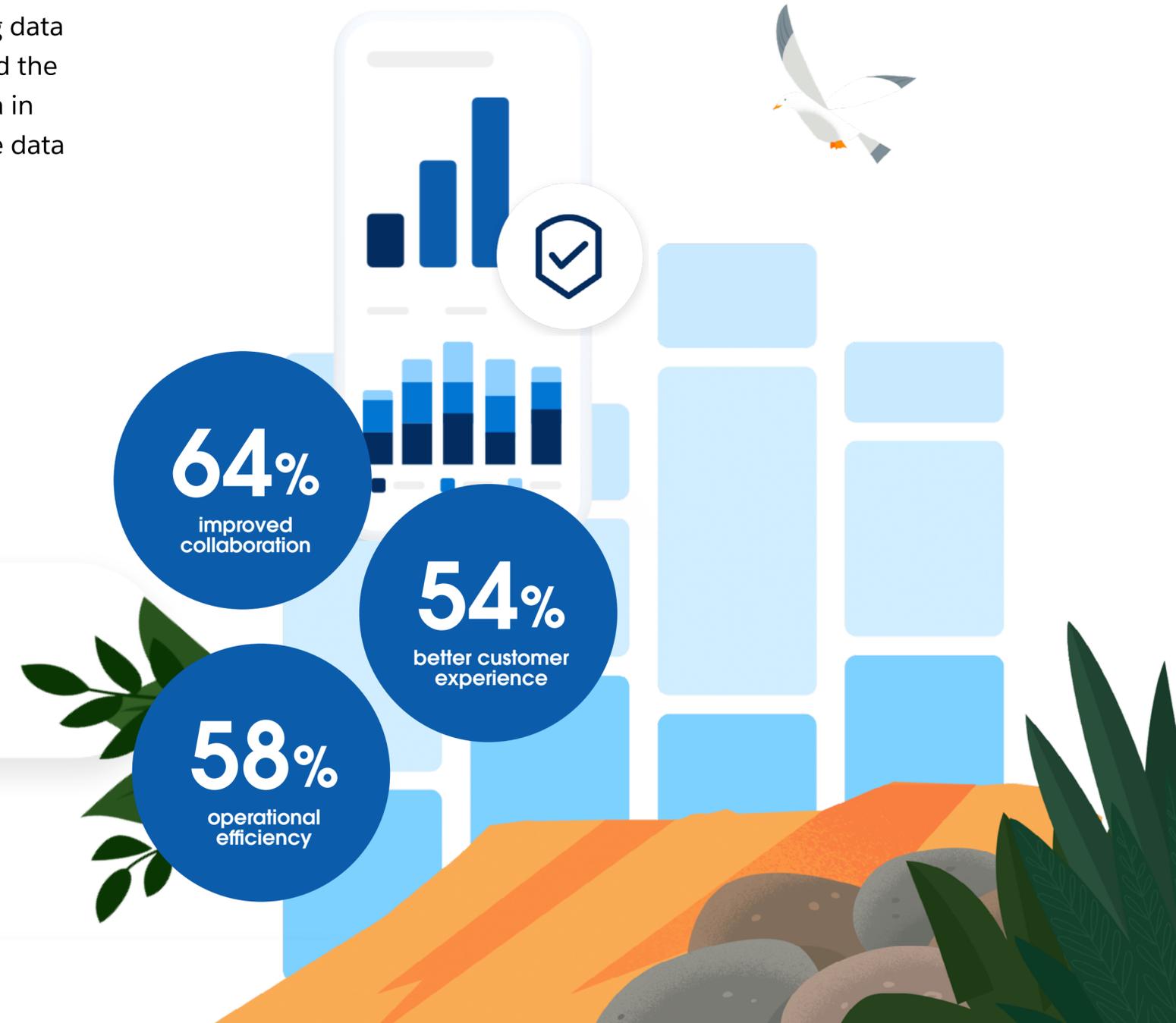
When you work in IT, you see firsthand how the increasing business appetite for data stresses existing systems—and even in-flight digital transformations. You're tasked with managing a sprawling data ecosystem that likely requires costly maintenance, and at the same time, your analysts can't find the information they need. If this sounds familiar, you're not alone: The average enterprise has data in more than 800 applications, and just **29% of them are connected**. Left unchecked, ineffective data governance and management can drag business down or run afoul of security requirements.

Challenges with data governance and management:

- ✓ Siloed, unmanaged data sources
- ✓ Strained relationships with business users
- ✓ Supporting mission-critical use cases

IT and business decision makers report that benefits from their alignment include improved collaboration (64%), operational efficiency (58%), and better customer experience (54%).

Source: "IT & Business Barometer," MuleSoft, July 2021



Design your data fabric for a successful Data Culture

Data fabric designs have become the North Star for data architectures, and for good reason. They promise to solve some of IT's biggest data governance challenges, like managing federated environments, unearthing data tucked into silos, and centralizing governance without having to centralize huge (and expanding!) volumes of data. These designs also create an opportunity for IT to partner with the business and foster a company-wide Data Culture. That way, you build your data fabric without disrupting how your teams work. Plus Tableau, the data analytics platform that people love to use, can help increase productivity across your organization.

The Tableau suite of products has capabilities ready-built to integrate with data fabric designs. Some include:

- ✓ Automatic ingestion of all data assets in your Tableau environment into a single data catalog, eliminating the need to set up an index schedule or configure connectivity
- ✓ Secure data access and sharing through virtual connections, enabling data owners to share access to groups of tables that can then be used across different workbooks, data sources, and prep flows
- ✓ A connector library for accessing databases and applications outside of Tableau, regardless of the data source or where it is stored

[Learn more about how Tableau supports data fabric designs](#)



Data fabrics do more than drive value with modern data management. They have the potential to create cross-functional collaboration and drive business-side support and adoption.

[Data Fabric's Value To The Enterprise](#)



Volker Metten

VP Product Management, Tableau

Manage, secure, and scale mission-critical analytics

At the enterprise level, all eyes are on IT leaders to meet tough security requirements and deliver great user experiences. React quickly to changing business needs and save time with streamlined management. Tableau Advanced Management offers enhanced, highly configurable capabilities for customers running Tableau for crucial use cases.

Advanced Management for Tableau* includes:

- ✓ The Content Migration Tool, which makes it easy to promote, transform, or archive content to meet robust content lifecycle management needs
- ✓ Customer-managed encryption keys which—on top of built-in encryption storage—provide a defense-in-depth strategy to protect your data
- ✓ An Activity Log that provides an immutable record of detailed and structured event data that enables permissions auditing, an essential aspect of implementing controls in your analytics deployment

*Tableau Advanced Management is licensed separately from Tableau Cloud.

[Learn more about Tableau Advanced Management](#)



Increased organizational agility with self-service analytics

The people closest to your business data should be able to ask and answer their own questions, but responsibly—you want self-service without chaos or compromise. Self-service analytics does not mean your employees have unfettered access to any and all data and analytics content. It means they have the freedom to explore pertinent business data that you know is trusted, secure, and governed.

Challenges with self-service analytics at scale:

- ✓ Security and quality risks
- ✓ Technical debt
- ✓ Expensive and outdated operations



36%
of time

IT teams spend over a third (36%) of their time designing, building, and testing custom integrations.

Mulesoft 2022 Benchmark Report

Deliver secure, trusted data

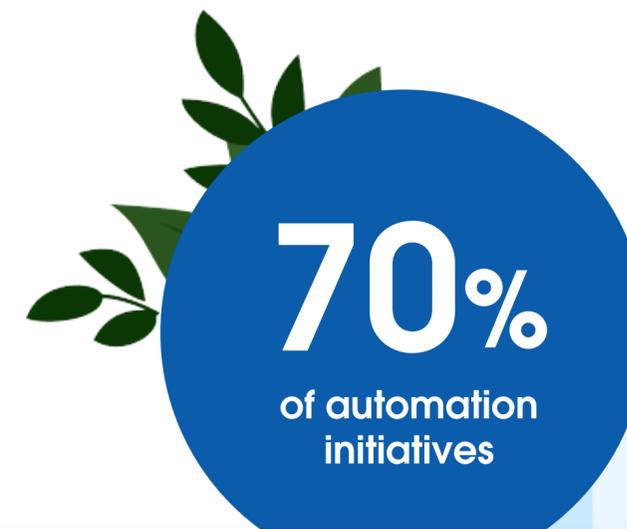
A lot of organizations that try out self-service analytics have unforeseen outcomes. Data can be used in unintended ways, duplicated, and stored out of sight—injecting disarray into data management. Today's IT leaders can enforce data management while also helping everyone in their organization make the best use of their existing, relevant content *without* duplicating it. Look to Tableau Cloud for this level of administrative visibility, flexibility, and agility.

The Tableau platform supports:

- ✓ Role-based licensing with governance built-in, so you can deploy data broadly across your organization while ensuring each user has the capabilities they need to make decisions based on data
- ✓ Customizable governance with the flexibility to implement security within the database (including at the row level), within Tableau, or a hybrid approach of both
- ✓ Recommendation capabilities that favor certified trusted sources and measures

[Learn more about the Tableau platform](#)

Ready to try it out? [Start a free trial](#)



70% of automation initiatives are hindered by security concerns and data silos.

Mulesoft IT and Business Alignment Barometer



Simplify IT operations with cloud-native analytics

Managing IT operations is expensive and arduous work, from putting procedures and controls in place to keeping systems up-to-date and compliant. The key to meaningful cost reduction lies with choosing a solution that reduces complexity and meets your needs without sacrificing existing infrastructure investments. This is where Tableau Cloud shines: It's fast, flexible, and deeply integrates with your existing architecture.

Tableau Cloud includes:

- ✓ Fully hosted support that eliminates the need to configure servers, manage software upgrades, or scale hardware
- ✓ Always up-to-date infrastructure with best-in-class industry security certification standards like SOCII and ISO
- ✓ Access to metrics on what data is being used, by whom, and at what frequency

Learn more about [Tableau Cloud](#)

Ready to try it out? [Start a free trial](#)



“In 2020, 64.2ZB of data was created or replicated, defying the systemic downward pressure asserted by the COVID-19 pandemic on many industries and its impact will be felt for several years.”

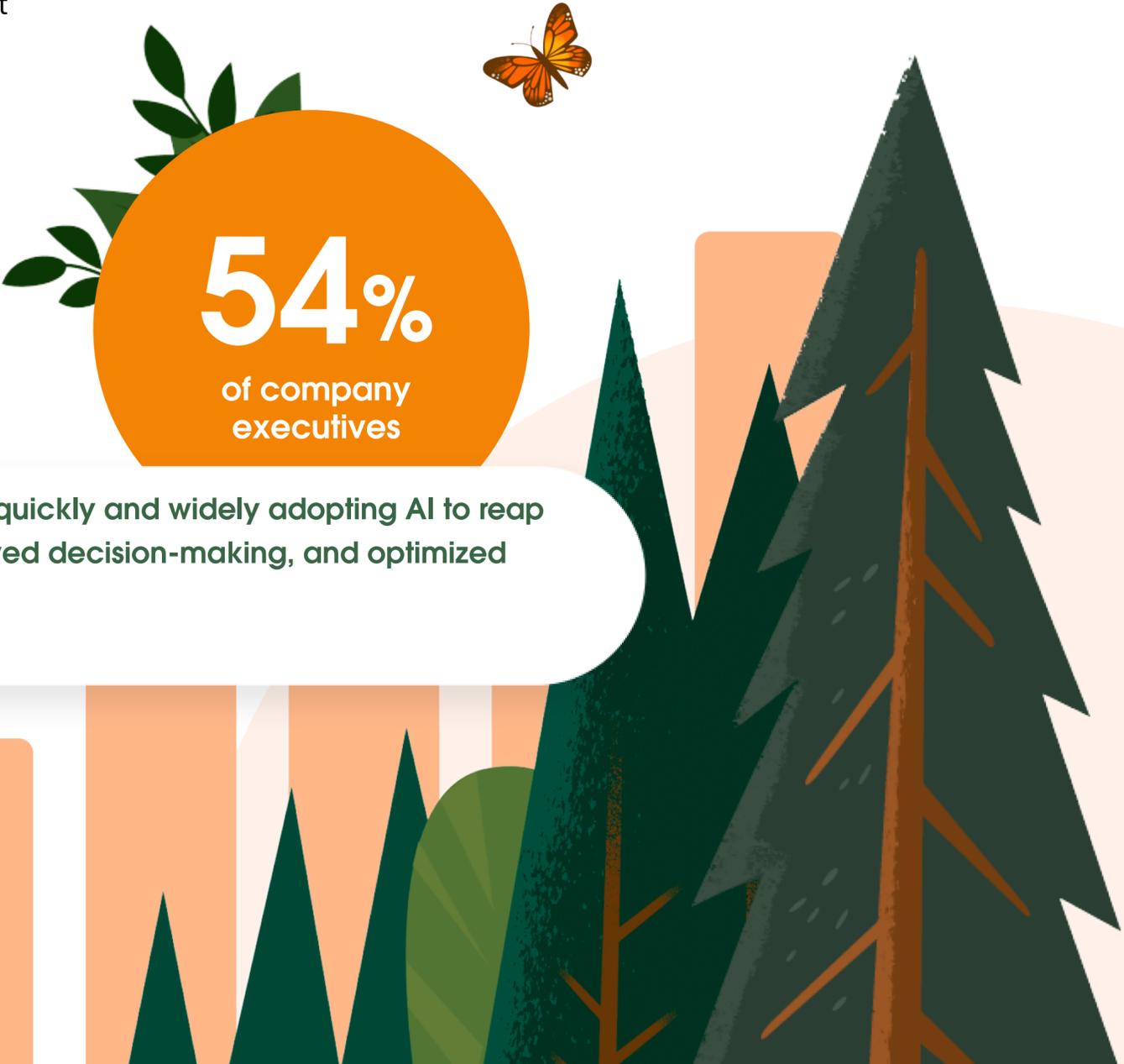
Source: Dave Reinsel, senior vice president, IDC's Global DataSphere

Help everyone get actionable insights faster

Making real-time decisions with trusted data requires powerful, yet intuitive analytics that enable people of all skill levels to get insights from data. Traditional reporting and distribution tools often require technical expertise to ask sophisticated questions or iterate during analysis. Today, intelligent tools can help automate the process so everyone makes faster, smarter decisions.

Challenges to finding meaningful insights:

- ✓ High barriers to entry and reliance on coding skills
- ✓ Manual forecasting is difficult and time consuming
- ✓ The time to business value is too long

An infographic featuring a large orange circle with the text '54% of company executives' inside. The circle is surrounded by green leaves and a butterfly. Below the circle is a white speech bubble containing text about AI adoption. The background includes stylized green trees and orange vertical bars.

54%
of company
executives

54% of company executives report quickly and widely adopting AI to reap benefits like revenue growth, improved decision-making, and optimized customer experience.

Source: PwC AI Predictions, 2021

Lower the barrier to accurate analysis with AI

To improve productivity with analytics available to everyone, you need an analytics solution that can support a wide spectrum of users and use cases. AI, machine learning, and natural language capabilities can be highly technical, but they can also be made approachable.

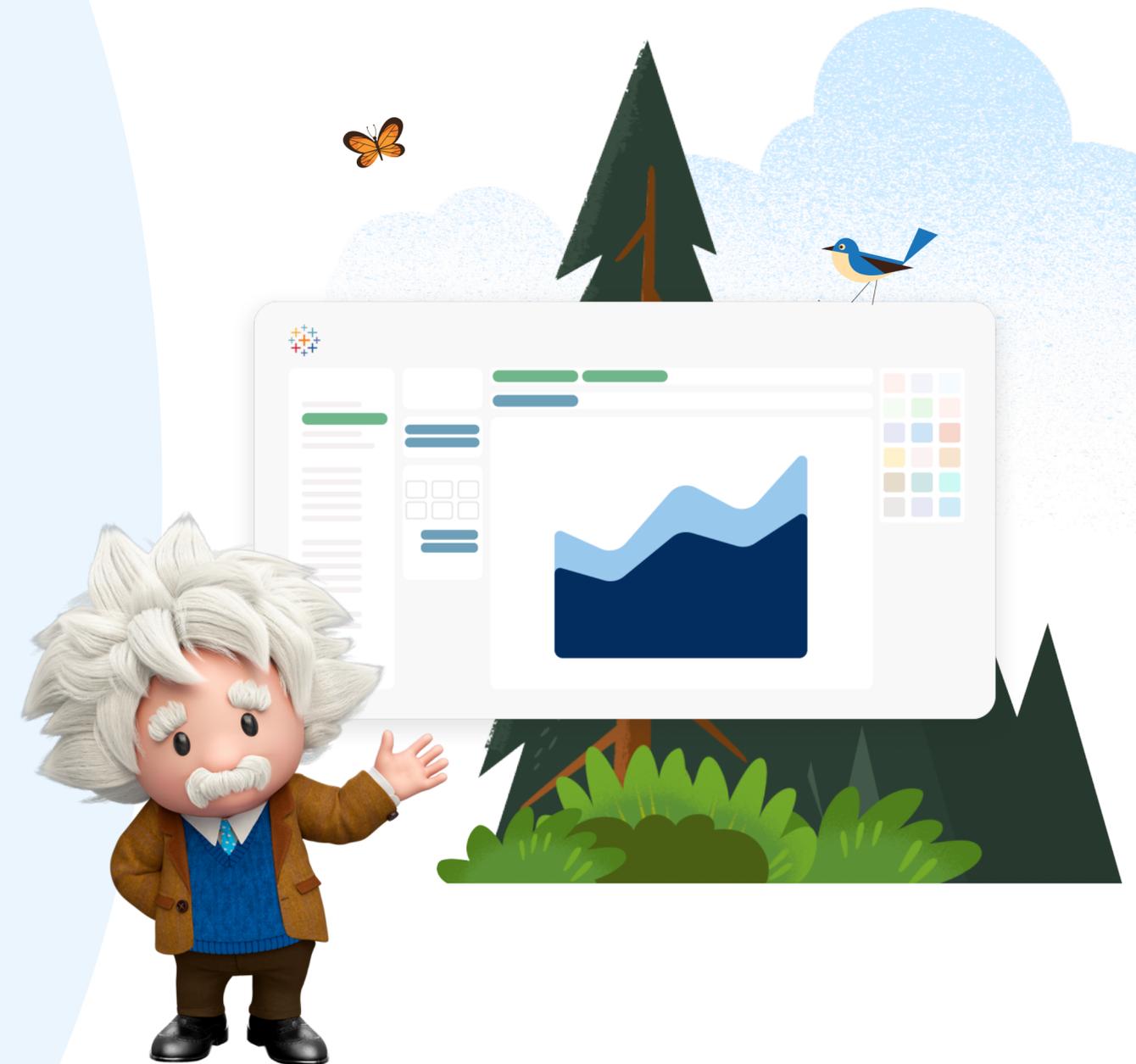
Tableau Cloud includes:

- ✓ AI and augmented analytics that make it quick and easy to deep dive into a single data point on a dashboard—and see a big picture summary
- ✓ Immediate access to our latest and greatest product innovations
- ✓ Einstein Discovery in Tableau*, which integrates machine-learning powered predictions and recommendations

*Einstein Discovery is licensed separately from Tableau.

[Learn more about Einstein Discovery in Tableau](#)

Lean on the [#DataFam](#), the world's most supportive data community, to help everyone in your business succeed with data. Learn more about the [Tableau Community](#)



Turn real-time insights into customer magic

Instrumental to bringing the vision of a data-driven world to life is Salesforce Genie, the new, real-time data platform that powers Salesforce Customer 360. Salesforce Genie harmonizes and updates data from all of your channels, unifying it into one single source of customer truth. You can turn insights from this truth into customer magic with Tableau Genie.

Tableau Genie is focused on making data connectivity and consumption easier than ever before, seamlessly bridging the gap between the Tableau portfolio and other products in Customer 360. Real-time insights within an integrated experience is here.

With Tableau Genie, users can:

- ✓ Create automated workflows to get timely insights from their data with Tableau Cloud
- ✓ Bring the power of Einstein AI to Salesforce Genie data and turn raw data into actionable insights with Einstein Discovery in Tableau
- ✓ Collaborate and act easily on real-time insights from data in Genie with Tableau's Slack integration

*Tableau Genie is licensed separately from Tableau.
Learn more about [Tableau Genie](#)



What's next?

Are you ready to take the lead? Tableau is here to help. Share this book with your colleagues, [start the free trial for Tableau Cloud](#), learn more about [Tableau for IT](#), and use our resources to help foster a Data Culture in your business.

More from Tableau

Tableau Blueprint

We've curated Tableau best practices and the expertise of thousands of customers to help you turn repeatable processes into core capabilities and become a data-driven organization. You'll have prescriptive, documented guidance to follow for every step in your journey. [Learn more about Tableau Blueprint](#)

Tableau Community

Expand support for your internal users with Tableau Community, a diverse, global data community of people in different roles and at every stage of their careers who have one thing in common: they use and love Tableau. [Learn more about the Tableau Community](#)

Data Leadership Collaborative

Keep the conversation going with the Data Leadership Collaborative, a group of like-minded leaders who help each other progress on the journey to building data-driven organizations. The DLC is a component of Tableau's commitment to furthering the conversation around Data Culture and helping organizations around the world put data at the center of their decision making.

[Learn more about the Data Leadership Collaborative](#)



The power of Salesforce and Tableau

Transform your business with Salesforce Customer 360—a customer relationship management (CRM) platform that connects marketing, sales, commerce, service, and IT through a shared view of customer data. Tableau integrates with Customer 360 to give every department access to the most powerful, comprehensive, and intuitive analytics features right within their workflows. By bringing customer data to the center of work, you can reduce costs and increase productivity while growing relationships with customers, partners, and employees.

[Learn more about Customer 360](#)

About Tableau

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 connects the business with a shared view of customer data—giving every department access to the most powerful, comprehensive, and intuitive analytics features embedded directly into workflows. By bringing your customer data to the center of your work, you can grow your relationships with your customers and employees.

