tableau
from Salesforce

Tableau Blueprint:

Defining your data and AI strategy for the agentic era

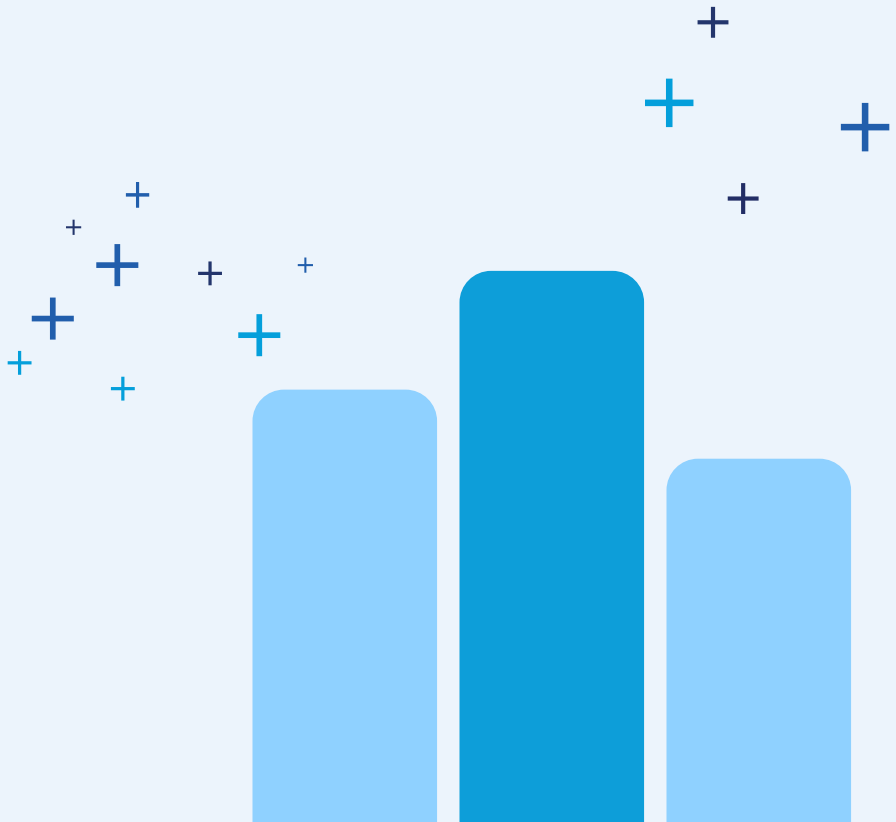

Tableau Blueprint

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Data and AI strategy: Get ready for the agentic era

Bold technology claims bombard business leaders on a daily basis. One minute headlines declare “AI will revolutionize everything – adapt or miss out,” the next they warn “AI threatens millions of jobs.”

This constant swing between techno-optimism and digital doom leaves many leaders wondering: What’s the real value beneath all this noise?

While the hype may be overwhelming, the underlying truth is compelling: Disruptive data and AI capabilities offer concrete, practical opportunities to transform your business and accelerate growth. With the agentic AI era now upon us, it’s not about sci-fi promises or doomsday scenarios – it’s about unlocking tangible business value.

However, while nearly every company is sitting on a gold mine of data, only a few are turning that data into real customer value and business impact. The question isn’t whether to become data-driven – it’s how fast you can make it happen.

The future belongs to companies that don’t just collect data, but use it to create impact.

What It Takes to Win with Data and AI

Turning data into a competitive advantage requires more than just technology; it demands the right foundation to drive adoption, automation, and long-term effect.

To succeed, you need:

The right strategy - To focus your vision, plan, and efforts on what drives effective change

The right tools - To enable insight, actionability, and AI-driven automation at scale

The right culture - To nourish a data-first mindset at every level of the organization

The right approach - To ensure data and AI delivers sustainable, repeatable business value

At Tableau, we believe that becoming a data-driven organization isn't just an IT project, but a business imperative. It's about creating a culture where every employee, decision, and customer interaction is powered by data and AI. The companies that master this shift won't just compete – they'll lead.

But here's the simple truth: You can't buy your way into becoming data-driven. It takes more than technology; it requires a clear roadmap and practical execution.

You need a strategic framework. You need a proven path.
That's why we created Tableau Blueprint.

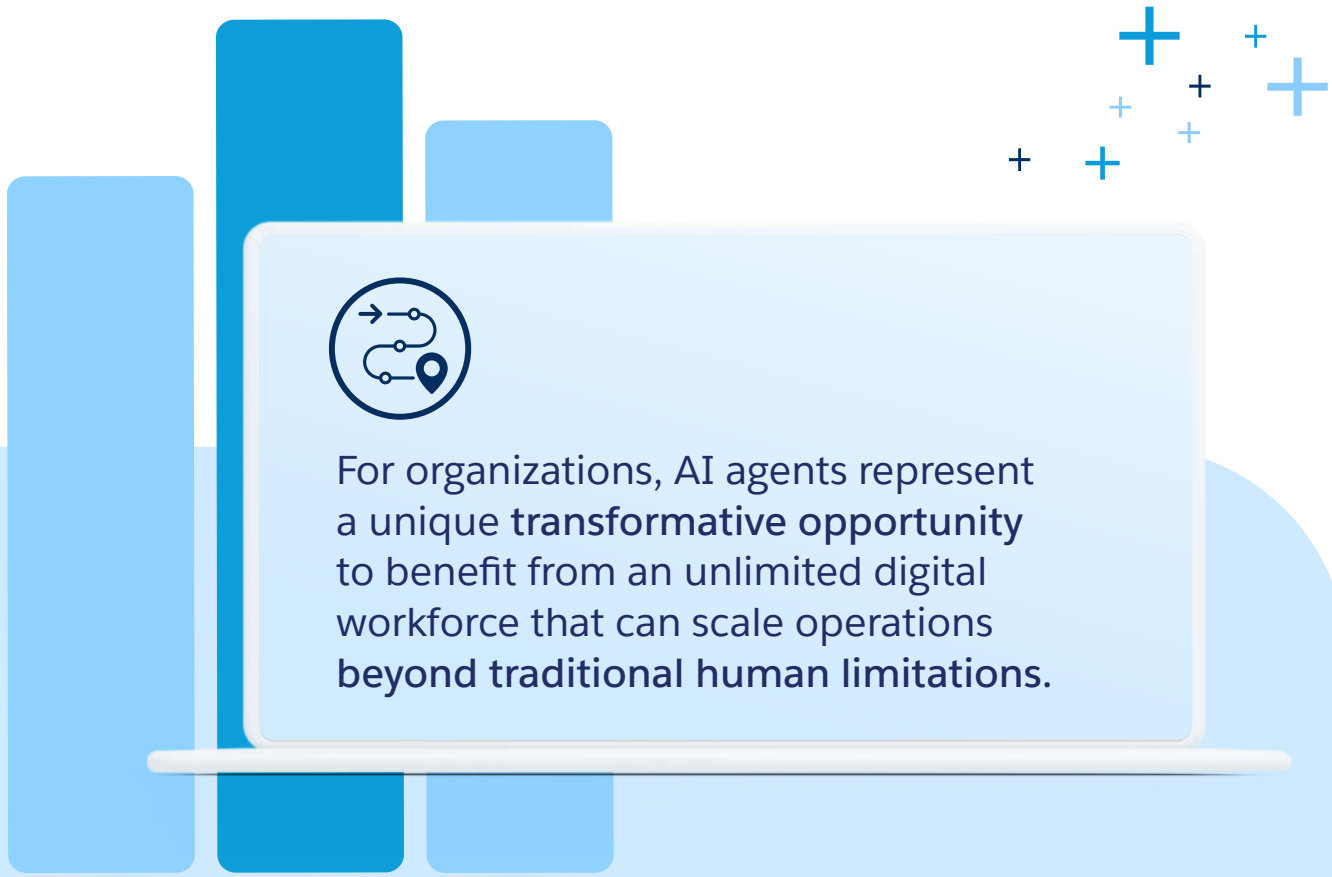
Are you ready to make it happen?

The Agentic AI Era Has Arrived

The agentic AI era isn't merely the latest technological evolution; this moment in time represents a fundamental reimagining of how intelligence, both artificial and human, interacts with the world's data.

What Are AI Agents?

AI agents are goal-oriented, intelligent systems, available 24/7, that operate in a few ways – from empowering everyone to providing assistance to employees, as well as taking fully autonomous actions. They are environment-aware, understand their mission, and acquire the knowledge they need to reason, plan, and complete tasks. Agents also deliver feedback and continuously learn from experience, representing the evolution from reactive tools to proactive partners in our digital ecosystem.



For organizations, AI agents represent a unique **transformative opportunity** to benefit from an unlimited digital workforce that can scale operations **beyond traditional human limitations.**

Data and Agents: A Symbiotic Relationship

AI agents cannot function without data. Even the most sophisticated agent will not operate at its best without high-quality data to inform its actions. Agents require data to sense their environment, understand business context, build knowledge, and effectively communicate insights. A visualization generated by an agent at precisely the right moment can illuminate patterns that would otherwise remain hidden in the noise.

Ultimately, data itself achieves its highest potential only through agents. This symbiotic relationship manifests in several transformative ways:

Agentic data orchestration

Your data architecture becomes dynamic as agents continuously optimize data pipelines and semantic layers, which help bridge data, business language, and applications to give people context. This adaptive aspect is based on evolving business needs – no more static, rigid data structure.

Agentic data skills

Imagine having tireless data analysts working around the clock, continuously generating insights, testing hypotheses, and uncovering opportunities that human analysts might never discover due to time constraints or cognitive biases.

Agentic data experiences

The rise of conversational analytics is transforming enterprise data interaction. These AI-powered interfaces create natural dialogues between people and their information, making sophisticated analysis accessible throughout organizations regardless of technical background.

Agentic event detection

Rather than retrospectively analyzing what happened, agents proactively identify emerging patterns, anomalies, and opportunities in real time, enabling organizations to act before competitors even recognize the signals.

Agentic actionability

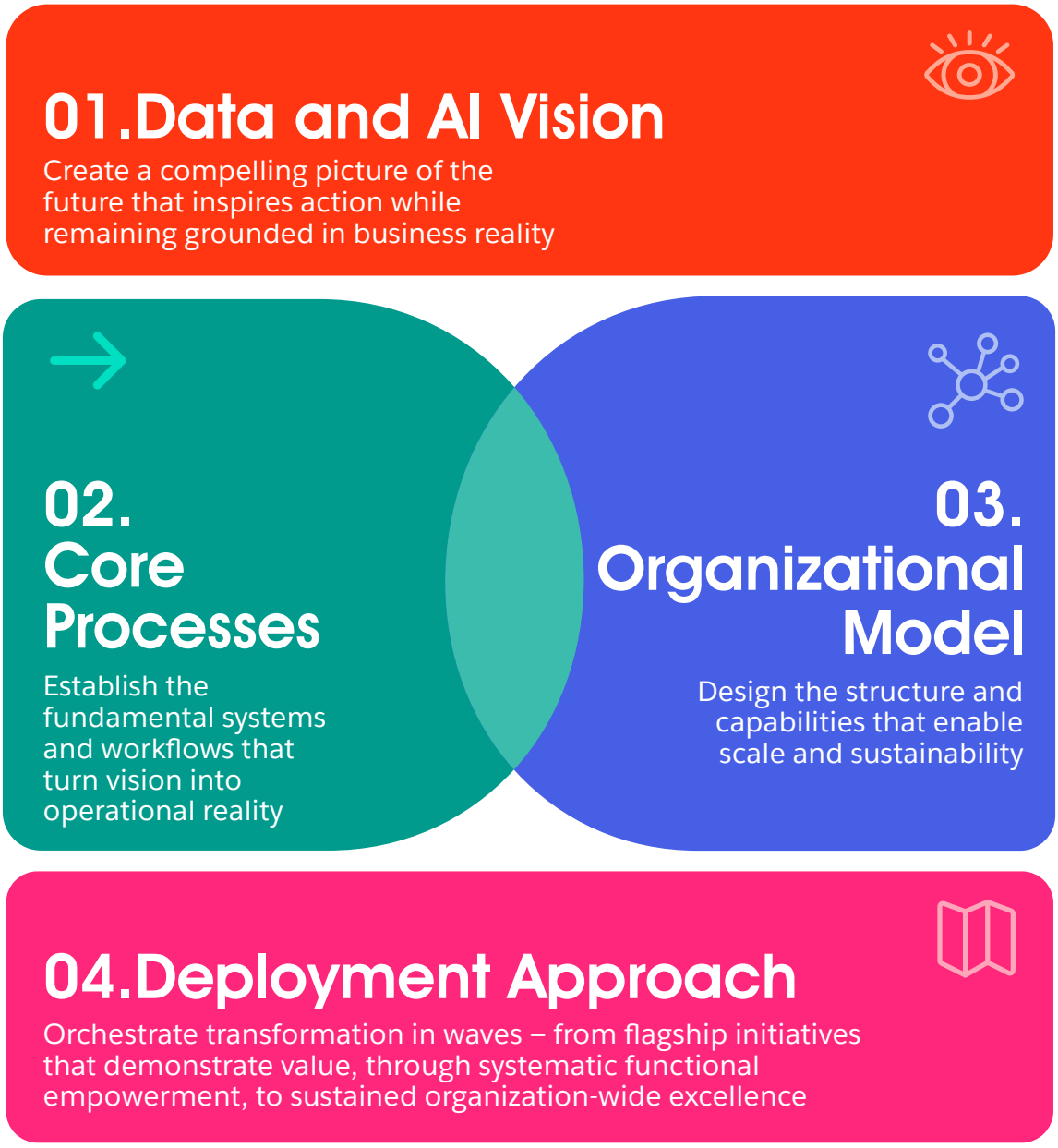
Perhaps most powerfully, agents transform the insight-to-action cycle. They not only discover insights, but convert them into recommended actions, orchestrate responses across systems, and execute adaptive plans autonomously within governance boundaries.

Organizations that recognize and embrace this symbiotic relationship between data and agents will dramatically outperform those still treating data as a passive resource to be mined for insights.

Executive Summary

A winning data and AI strategy isn't just another IT initiative or digital project. It's your blueprint for transformation – a clear vision of the future, backed by practical plans, so you can make it a reality. Without this, data initiatives can dissolve into a collection of disconnected projects, competing priorities, and unrealized potential.

The purpose of this ebook is to show you how to build a comprehensive data and AI strategy through four essential pillars:



01 Data and AI Vision

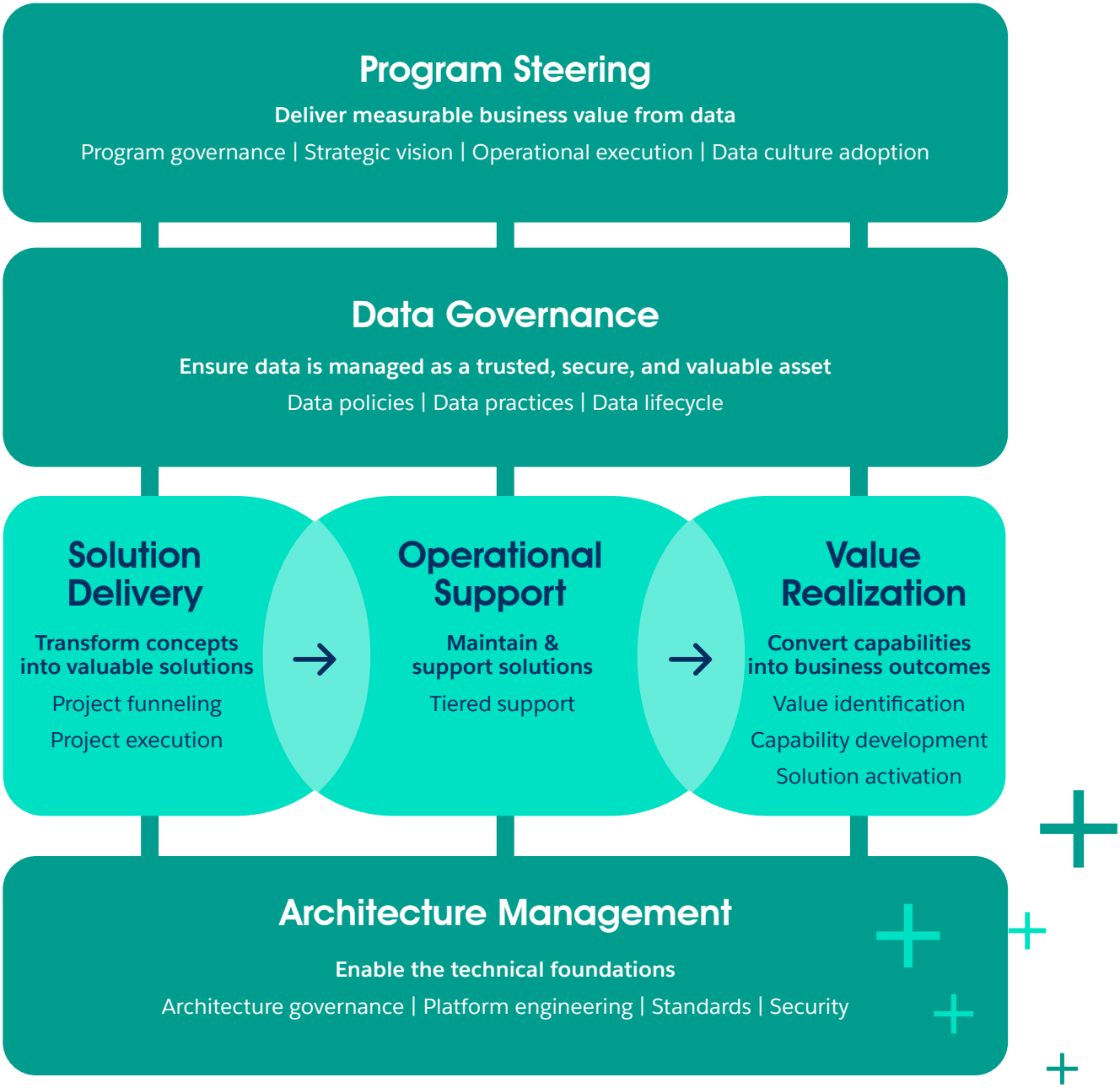
The foundation of any successful data transformation begins with a compelling vision. You've defined where you want to go and, more importantly, why it matters for your business.

Your vision should paint a picture of how data and AI will fundamentally transform your business within a specific timeframe. It should also excite and inspire while remaining grounded in business reality.

Think of your vision as a North Star:
Clear enough to **guide decisions,**
compelling enough to **inspire action,**
concrete enough to **measure progress.**

02 Core Processes

The journey from data ambition to business impact demands a set of well-designed, interconnected processes that will transform your business. Think of these processes as the engine of your data and AI strategy, where each component plays a vital role turning potential into performance.

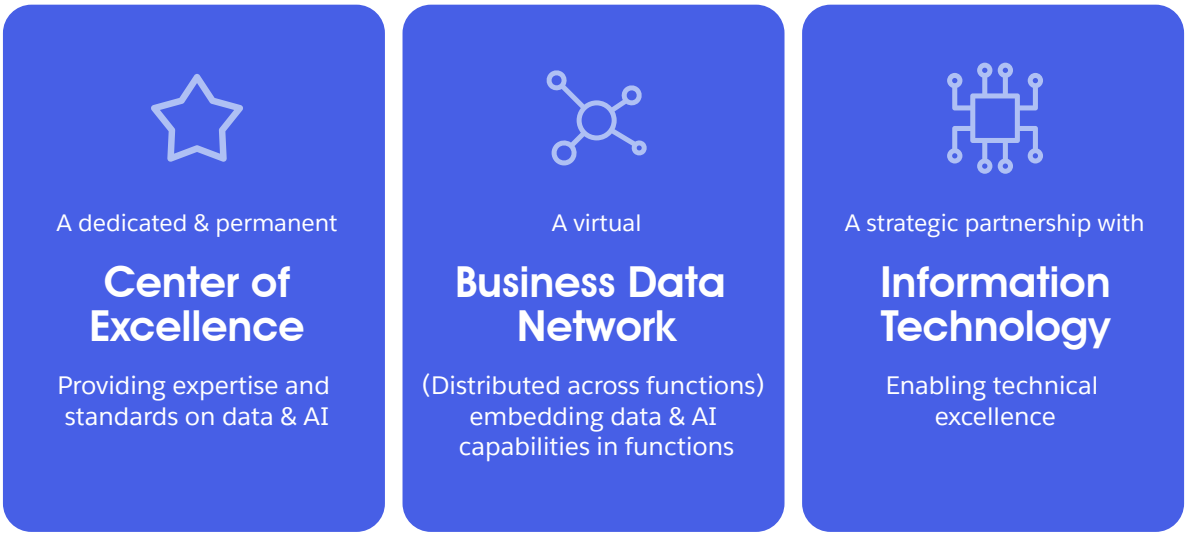


03 Organizational Model

The success of data and AI initiatives depends as much on organizational design as on technology choices. Organizations have evolved from scattered analytics teams to centralized reporting groups, then to specialized data science units. However, these traditional models, whether centralized or federated, no longer suffice in the era of agentic AI.

Your imperative is to create structures that support modern analytics and enable AI autonomy and human-and-agent collaboration. This requires building adaptive organizations that can harness human expertise plus AI capabilities.

Based on practical experience across industries, this Three-Pillars Organizational Model creates clear accountability across teams while enabling collaboration. It combines distinct yet interconnected components to create a comprehensive organizational framework:



The Three-Pillars Organizational Model

04 Deployment Approach

The journey from strategy to reality is where many data and AI initiatives falter. Having defined your vision, core processes, and organizational model, the critical question becomes: How do you implement these elements in your organization's technical environment?

Organizations vary in size, maturity, industry context, and technical capabilities. A global enterprise with established data practices faces different challenges than a mid-size company taking its first steps beyond basic reporting. Similarly, a digital-native business requires a different approach than one wrestling with legacy systems and traditional operating models.

Tableau Blueprint offers a flexible implementation roadmap based on thousands of customer implementations. We've organized it in three progressive phases that can be adapted to fit any organization: Ignite, Empower, and Outperform.

Each phase builds upon the previous one in a natural progression. To make the most of the Tableau Blueprint, you need to tailor the specific activities, timelines, and emphasis of each phase to your organization.

Ignite

Focuses on creating momentum through a strategic use case while establishing foundational elements.

Empower

Scales capabilities across the organization, formalizing processes and building out the three-pillar model.

Outperform

Sustains excellence through continuous improvement and innovation, enabling the transition to the agentic era.

Section One

Data and AI Vision

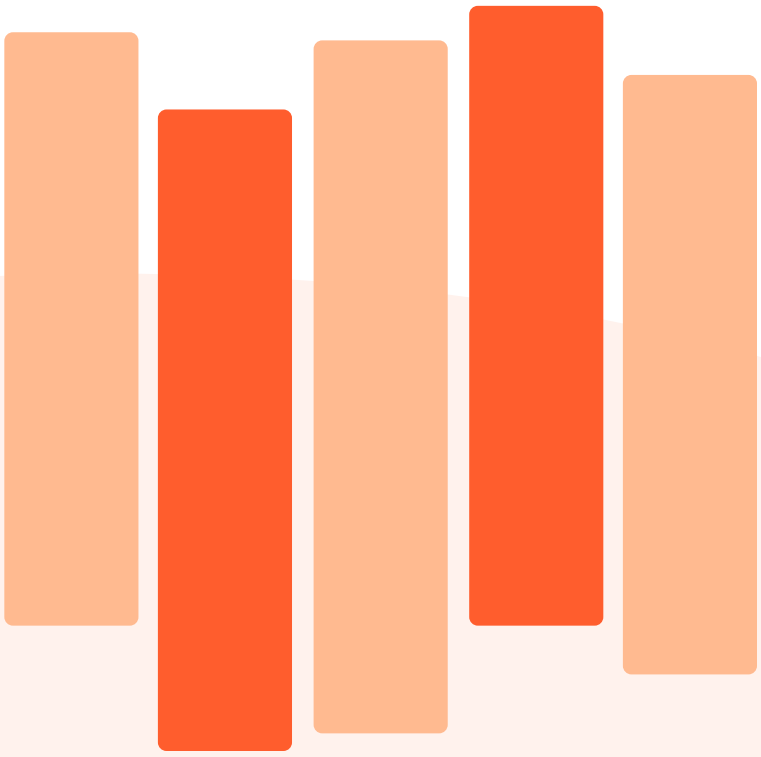


Tableau Blueprint

Data and AI Vision

Every successful organizational transformation through data starts with a clear and compelling vision. A data and AI vision must go beyond vague aspirations like "becoming data-driven" or "leveraging AI." It needs to paint a clear picture of how data and AI will fundamentally transform your business, with a firm timeframe that creates urgency and helps teams understand the required pace of change.

The aim of your vision is to excite and inspire, while remaining grounded in business reality. To be effective, the vision must incorporate three core elements: a Target Business Model (what you want to become), Value Creation Priorities (where you need to focus), and Competitive Advantages (how you will win).

1. Target Business Model: Inward Operational Transformation

Your vision must articulate exactly how your organization will operate in the future. This transformation spans across every dimension of your business:

- How will you create and deliver value differently?
- What new capabilities will reshape your operations?
- How will the experience change for customers, employees, and partners?
- What new revenue streams or business models will emerge?

2. Value Creation: Strategic Focus and Resource Allocation

With endless possibilities for using data and AI, focus becomes crucial. For the most value, your vision should identify three dimensions:

- **Impact**: Which areas will deliver the greatest business results?
- **Feasibility:** What can you realistically achieve given your resources and capabilities?
- **Time Horizon**: How will you balance quick wins with long-term transformation?
- **Capability Building:** What foundational data capabilities must be prioritized first?

3. Competitive Advantages: Outward Market Differentiation

In today's market, data and AI capabilities are powerful differentiators. Your vision also should articulate how you'll build sustainable competitive advantages:

- What unique data assets will you develop?
- How will you combine industry expertise with AI capabilities?
- What network effects or barriers to entry will you create?
- How will your approach become difficult for competitors to replicate?

Vision in Action

Below are some strategic questions you can use to craft your own vision.

Vision Examples

Financial Services

By 2026, revolutionize wealth management by combining automated, proactive insights with predictions that forecast market opportunities and AI agents that automatically execute personalized portfolio strategies, so human advisors can focus on complex financial planning.

Retail

By 2026, deliver the ultimate shopping experience by merging deep customer insights with conversational analytics tools and AI shopping assistants that not only predict customer needs but proactively curate and adjust personalized offerings in real time.

Healthcare

By 2027, transform patient care by uniting predictive health analytics with AI care coordinators to detect risks early and automatically orchestrate personalized interventions across the entire care journey.

Your vision should balance ambition with practicality, inspiration with execution, and transformation with reality. It must provide a clear direction your organization can take while remaining flexible enough to adapt as technologies and markets evolve.

Use this space to write your own data vision.

- What is your timeline?
- What operational objectives are you trying to achieve?
- How can you harness data and AI agents to achieve it?
- What will the desired outcome look like?

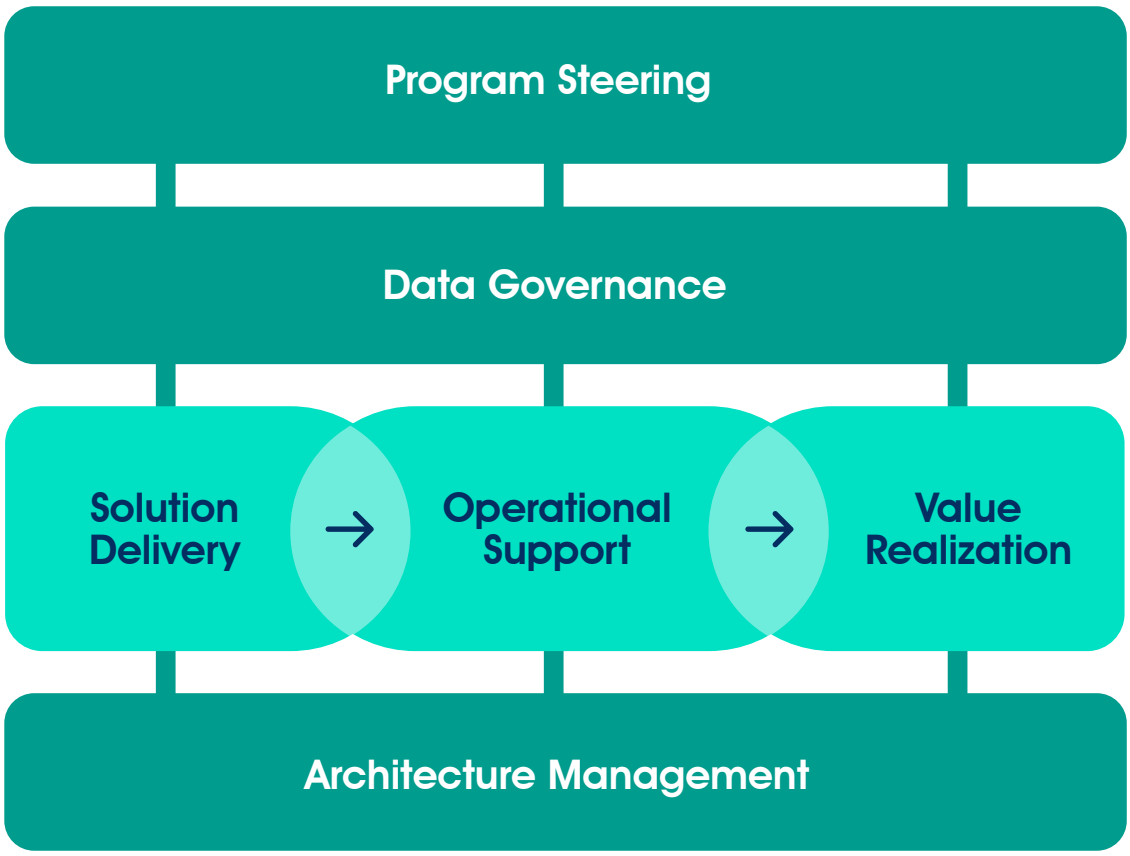
Section Two

Core Processes

Tableau Blueprint

Core Processes

The journey from data ambition to business impact requires a set of well-designed, interconnected processes that work together to transform your business. Our framework consists of six core harmonious processes that each help convert potential into performance:



These processes don't operate in isolation. They form an integrated system where:

Program Steering and Data Governance provide the **strategic framework** → Solution Delivery, Operational Support, and Value Realization create a **continuous value chain** → Architecture provides the **technical foundation** that supports all the other elements

The Agentic Era

Reimagine your data strategy with the boldness of vision that meets this moment of transformation. Create the foundation for intelligence and real-time decisions with agentic analytics.

The transition to the agentic era adds new dimensions to each process. Program Steering must balance traditional analytics with AI innovation. Data Governance expands to address AI ethics and safety. Solution Delivery encompasses both human-driven and autonomous systems. Operational Support handles increasing automation. Value Realization tracks immediate benefits and transformative potential. Architecture enables effective human-AI collaboration.

Successful organizational transitions share common characteristics:

They maintain **strong alignment between processes**

They **build systematic practices** while preserving flexibility for innovation

They **balance immediate needs** with long-term transformation goals

They invest in human capabilities and **technical excellence**

They **measure success** across multiple dimensions

They **adapt processes** as capabilities mature

The foundations they provide – clear direction, strong governance, reliable delivery, efficient operations, systematic value creation, and robust architecture – become even more critical as organizations navigate increasing complexity and automation.

As we move deeper into the agentic era, these processes will continue to evolve.

1 Program Steering

Direct strategic vision, operational execution, and data culture adoption to ensure data and AI initiatives deliver measurable business value through active leadership and governance.

At the heart of any successful data and AI transformation lies effective program steering. This isn't merely about managing projects or checking boxes – it's about orchestrating a complex symphony of change across your organization where human teams and AI systems play increasingly important roles. Program steering ensures that your initiatives stay aligned with business goals, maintain momentum, and deliver true value in an environment where the pace of change is accelerating and the boundaries between human and machine capabilities are continuously evolving.

1 Strategic Leadership

The foundations they provide – clear direction, strong governance, reliable delivery, efficient operations, systematic value creation, and robust architecture – become even more critical as organizations navigate increasing complexity and automation.

2 Operational Excellence

While strategy sets the direction, operational excellence steers successful execution. This component creates the frameworks and processes that enable consistent, quality delivery at scale.

3 Cultural Transformation

Even the best strategy and operations will fail without organizational adoption. This component focuses on creating the mindset and behaviors needed for lasting change.

The Tableau Advantage

Deliver Effective Change Management

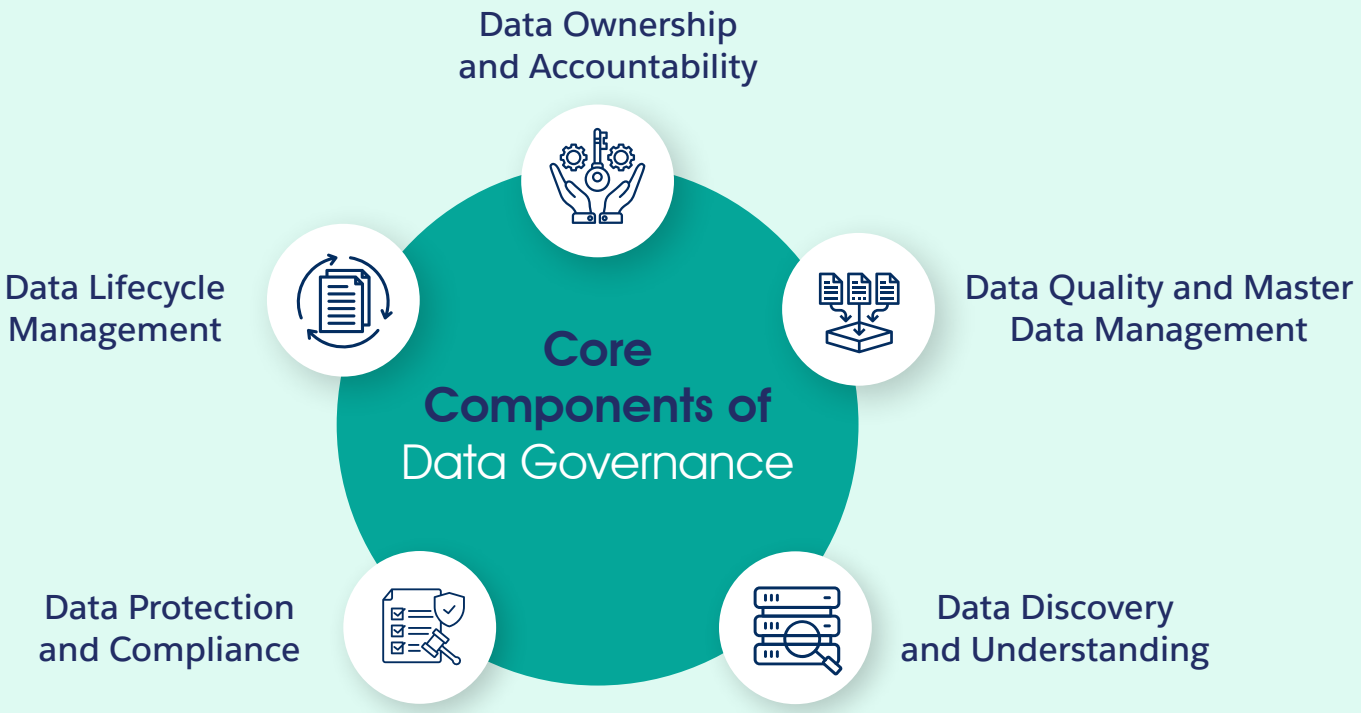
Tableau offers a wide range of tools and services that enable successful change management within your business. Expert Coaching lets you collaborate with a Tableau Success Guide to find the resources you need for successful Tableau deployment. Success Manager helps you drive change, grow adoption and achieve analytics transformation. In addition, Tableau's extensive array of online webinars, user groups and global events let you meet with peers, exchange best practices and unlock new ways of achieving your business objectives.

2 Data Governance

Establish policies and practices to ensure data is managed as a trusted, secure, and valuable asset throughout its lifecycle, with clear accountability, compliance standards, and quality controls.

If program steering is the heart of your transformation, data governance is its backbone. Too often, organizations rush to build sophisticated analytics and AI capabilities without first establishing strong data governance.

Good governance focuses on enabling scale and trust. As organizations evolve from traditional analytics to agentic analytics, governance must adapt while maintaining its fundamental principles.



Data Governance

Data Ownership and Accountability

Clear ownership and accountability form the cornerstone of effective data governance. In a world where data flows across organizational boundaries and AI systems operate autonomously, establishing who owns, manages, and is accountable for data becomes more challenging, but increasingly critical. The key is creating a framework that balances centralized oversight with distributed responsibility.

Data Quality and Master Data Management

Master data management consistently defines and maintains critical business entities like customers, products, and locations across your organization. As AI systems become more prevalent, the impact of data quality becomes even more pronounced, making robust quality management essential for success.

Data Discovery and Understanding

Data only creates value when people can find it, understand it, and use it appropriately. In today's complex data landscape, organizations must navigate an ever-growing variety of data formats and multiple occurrences of similar information across traditional databases, data lakes, AI systems, and third-party sources. Effective data discovery isn't just about building catalogs – it's about creating a clear, intuitive way for users to find, understand, and appropriately use data assets.

Data Protection and Compliance

Data protection goes far beyond security measures. It helps build and maintain trust with customers, partners, and regulators while enabling innovation and value creation. With increasing regulatory scrutiny and growing privacy concerns, organizations must balance how to protect and derive value from data. This becomes even more delicate as AI systems autonomously access and process sensitive information.

Data Lifecycle Management

Like any valuable asset, data needs to be actively managed throughout its entire lifecycle. From creation or acquisition through active use and ultimately to archival or deletion, every stage requires careful consideration and appropriate controls. The challenge grows as AI systems continuously generate new data and transform existing assets.

The Tableau Advantage

Discover, Understand, Connect, and Trust Your Data

Data Management capabilities help deliver trusted, self-service analytics by scaling data automation and operationalisation throughout the entire data and analytics lifecycle.

Unlock the Power of Agentic AI with Tableau Semantics

Tableau Semantics is an AI-infused semantic layer that accelerates semantic model creation with AI assistance and speeds up time to insight, while enriching agents with deep business knowledge.

3 Solution Delivery

Transform data and AI concepts into reality through structured project funneling and execution processes that balance technical excellence with measurable business outcomes.

The true test of any strategy lies in its execution. Solution delivery is where your data and AI ambitions become reality. This process encompasses everything from initial concept to final implementation, ensuring that each solution not only works technically but delivers tangible business value. As organizations deploy traditional analytics and autonomous AI systems, solution delivery must handle increasing complexity and maintain speed and quality.

Core Components of Solution Delivery

Solution delivery operates through two streams that work together to transform ideas into impact. These streams must handle traditional analytics and modern AI solutions, from straightforward dashboards to complex autonomous systems.

01. Project Funneling

In a world of unlimited possibilities but limited resources, effective project funneling of requests and priorities becomes crucial. This component acts as a filter and accelerator – ensuring resources flow to the highest-value opportunities while maintaining a balanced portfolio of initiatives.

02. Project Delivery

With projects selected, the focus shifts to execution excellence. This component transforms ideas into reality through a structured yet adaptable process. While traditional project management principles remain relevant, delivery must now accommodate the unique aspects of AI solutions. These range from new ways of using data with autonomous agents to updated process flows, iterative model development, and ensuring ethical AI use.

The Tableau Advantage

Ensure Seamless Solution Delivery

Tableau's on-site Professional Services and Training offer best practices and advice that delivers high ROI and makes sophisticated data analysis a reality for everyone. In addition, Tableau's Partner Network of over 1,400 global partners means help is always at hand to solve your toughest data challenges.

Each component must work in sync with the others, in a seamless flow from idea to impact. The art lies in maintaining this harmony while adapting to new technologies and evolving business needs.

Project Funneling → Submit project requests → Evaluate Project Submissions → Accept/Decline Project Submissions → Prioritize & Plan Projects

Project Delivery

Project Initiation

Appoint Project Team

- Establish Project Charter
- Objectives & Scope
- Deliverables
- Planning
- Resources
- Architecture
- Dependencies
- Applicable policies (Data Governance & Architecture)

Validate Project Charter

Project Execution

Business Team

- Formalize data use case & business requirements
- Prepare testing scenarios
- Validate the solution

Project Implementation Team:

- Formalize design
- Implement the solution
- Move to Test environment
- Perform integration testing
- Prepare deployment packages
- Support initial post go-live

Center of Excellence / IT:

- Validate solution design
- Prepare Test & UAT environments
- Validate solution implementation
- Move to UAT & Production environments
- Prepare deployment packages
- Support initial post go-live

Project Closure

Ensure & formalize project completion

- Handover to 'Support'
- Capitalize lessons learned
- Communicate successes

4 Operational Support

Sustain data and AI solution value through tiered support, service continuity management, data validation, and AI operations monitoring to ensure reliable performance and continuous improvement.

Moving from project to production is a critical transition in your data journey. Operational support ensures that your data solutions don't just work technically, but deliver sustained value to your business.

When done right, operational support creates a virtuous cycle of adoption and improvement. It ensures that users have the support they need, that systems perform reliably, and that data quality remains high. This is what enables success.

Core Components of Operational Support

In data and AI-driven environments, operational support must evolve beyond traditional IT service management to handle both traditional data uses and autonomous systems. These core components work together to ensure reliable, efficient operations while maintaining high standards of data quality and system performance.

01. Support and Maintenance

Handles day-to-day interactions with people and systems. It ensures solutions remain functional, secure, and aligned with business needs while adapting to human-guided and AI-driven operations.

02. Service Continuity

Focuses on maintaining uninterrupted service delivery, crucial in an environment where data consumers and AI systems depend on constant access to data and analytics capabilities.

03. AI Operations Management

A critical new component in the agentic era, focused on maintaining and optimizing autonomous systems while ensuring appropriate human oversight.

04. Data Validation

As your teams increasingly rely on data and AI for decision-making and operations support, this component ensures the ongoing quality and reliability of data assets.

The Tableau Advantage

Set Your Organization Up for Success

Salesforce Success Plans provide comprehensive resources, guidance and support for every stage of your journey with Tableau. An extensive online library of 'how to' manuals and guides help to quickly troubleshoot any issues faced, while Tableau's global community lets you connect with fellow Tableau users across over 400,000 forums in seconds.

Support Levels: A Tiered Approach

A well-designed tiered support model ensures issues are resolved efficiently while maintaining system reliability and user satisfaction. Each layer brings specialized expertise, working together to provide comprehensive support coverage.

First-Level Support (Front-Line Operations)	Acting as the primary interface between users and support services, this layer handles initial contact and basic issue resolution.
Second-Level Support	This layer brings deeper technical knowledge and specialized skills to resolve issues that cannot be handled at the first level.
Third-Level Support	Combining deep technical expertise with strategic oversight, this layer handles complex challenges and critical incidents.
Fourth-Level Support (External Support)	Engaging with external specialists, including product vendors, consulting firms, and subject matter experts to resolve complex issues and leverage specialized knowledge beyond internal capabilities.

The effectiveness of this tiered model depends on clear escalation paths, well-defined responsibilities, and smooth collaboration between support layers. As organizations deploy increasingly autonomous systems, these layers need to evolve capabilities while seamlessly integrating human expertise and AI-driven support tools.

5 Value Realization

Transform data and AI capabilities into measurable business outcomes through value identification, capability development, solution activation, measurement, and continuous evolution.

Value realization represents the crucial bridge between data capabilities and business outcomes. While organizations invest heavily in data infrastructure, analytics tools, and AI systems, these investments only deliver returns when they drive measurable business impact. As we tread further into the agentic analytics era, this transformation becomes ever-more powerful and complex.

This process goes beyond traditional return on investment tracking. It focuses on embedding data and AI capabilities into the fabric of your business operations, ensuring that every insight leads to action and that every action creates value. This requires a shift from passively consuming data to actively engaging with intelligent systems that autonomously drive business processes.

The Tableau Advantage

Unleash the Full Power of Tableau

Learn how to unlock your data with free training videos, live instructor-led training, and hands-on practice with Trailhead. Get inspired by over eight million dashboards in Tableau Public and leverage 400+ data apps and templates in Tableau Accelerators to jump start every data project.

Core Components of Value Realization

Successful value realization requires orchestrating six core components while fostering a strong network of champions.

01. Value Identification and Planning

Organizations need to clearly identify where and how their investments will create value before diving into analytics use or deploying AI systems. This component ensures that you target the right opportunities and set clear paths in your plan.

02. Capability Development

Agentic analytics requires a new breed of data-savvy analysts and business professionals. This component systematically builds the skills, mindsets, and behaviors needed across the organization. It goes beyond traditional training to create true data fluency – where people not only understand analytics but confidently collaborate with agents.

03. Solution Activation

This component transforms technical capabilities by embedding them into workflows, decisions, and processes. With autonomous solutions, activation requires careful orchestration of human-AI collaboration patterns.

04. Value Capture and Measurement

This component provides the mechanisms to track, quantify, and communicate the impact of data and AI investments. Capture the full spectrum of business impact, from quantifiable financial returns to qualitative improvements in decision-making, operational excellence, market responsiveness, and competitive positioning.

05. Analytics Governance

This component establishes frameworks to manage analytics assets throughout their lifecycle. Defines clear publication rights, maintains comprehensive catalogs of available resources, and implements quality standards. Doing so creates a sustainable ecosystem where analytics assets are discoverable, understood, and properly maintained.

06. Continuous Evolution

This component ensures solutions remain relevant and effective by systematically capturing feedback, monitoring performance, and making improvements. For autonomous agents, this includes technical updates as well as learning from operational experience.

6 Architecture Management

Establish and evolve the data and AI technical foundations through governance, platform engineering, standards, solution validation, security, and innovation management to support both human analytics and autonomous systems.

Architecture in the agentic era must evolve beyond traditional data foundations to support both human-driven analytics and autonomous AI systems. It's no longer just about storing and processing data – it's about creating an environment where insights flow freely, AI agents operate safely, and human and machine intelligence thrive together.

Modern architecture requires balancing competing demands: stability with innovation, control with autonomy, and security with accessibility. Think of it as designing a living system rather than a static structure – one that can sense, adapt, and evolve while maintaining its core integrity.

The Tableau Advantage

A Deeply Unified Platform

The Salesforce Platform is based on a unified data and metadata model, which means all customer data, across every department, is seamlessly integrated and accessible through Data Cloud, Salesforce's hyperscale data engine. This means no more data silos and no more incomplete or conflicting information.

Powerful, Scalable, Secure Analytics Without Compromise

The Tableau platform combines highly robust security standards with agile governance, while its open and extensible architecture lets you unleash the value of existing investments and scale as needed without impacting performance.

Core Components of Data, AI, and Analytics Architecture

Managing data and AI architecture requires dedicated processes that work seamlessly together. While the architecture provides the technical foundation, these core components represent the processes and organizational capabilities needed to design, maintain, and evolve that foundation effectively.

01. Architecture Governance

As organizations balance traditional analytics with AI automation, architecture governance must orchestrate increasingly complex technical ecosystems. This component guides the overall architectural journey, ensuring technical decisions support business strategy while maintaining the flexibility needed for innovation and growth.

02. Platform Engineering

The growing sophistication of data and AI solutions demands robust, scalable foundations. This component translates architectural vision into concrete capabilities, building the platforms that power everything from traditional analytics to autonomous AI systems while ensuring reliability and performance at scale.

03. Standards and Guidelines

In an era of rapid technological change and increasing system autonomy, consistent development approaches become critical. This component establishes the frameworks and patterns that enable quality at scale, addressing not just traditional development but also the unique challenges of implementing AI.

04. Solution Validation

As systems become more autonomous and interconnected, ensuring architectural alignment becomes increasingly crucial. This component maintains architectural integrity through systematic validation, ensuring solutions meet current requirements and future needs while managing growing complexity.

05. Security and Governance

As data capabilities become more powerful and AI systems more autonomous, security and governance take on new dimensions. This component ensures protection of assets while enabling appropriate access and use. It addresses not just traditional security concerns but also the unique challenges of AI safety and ethical operation.

06. Innovation Management

With technology evolving at unprecedented speed, proactive innovation management becomes essential. This component systematically evaluates and integrates new capabilities while protecting architectural integrity, creating safe paths to adopt emerging technologies without compromising stability.

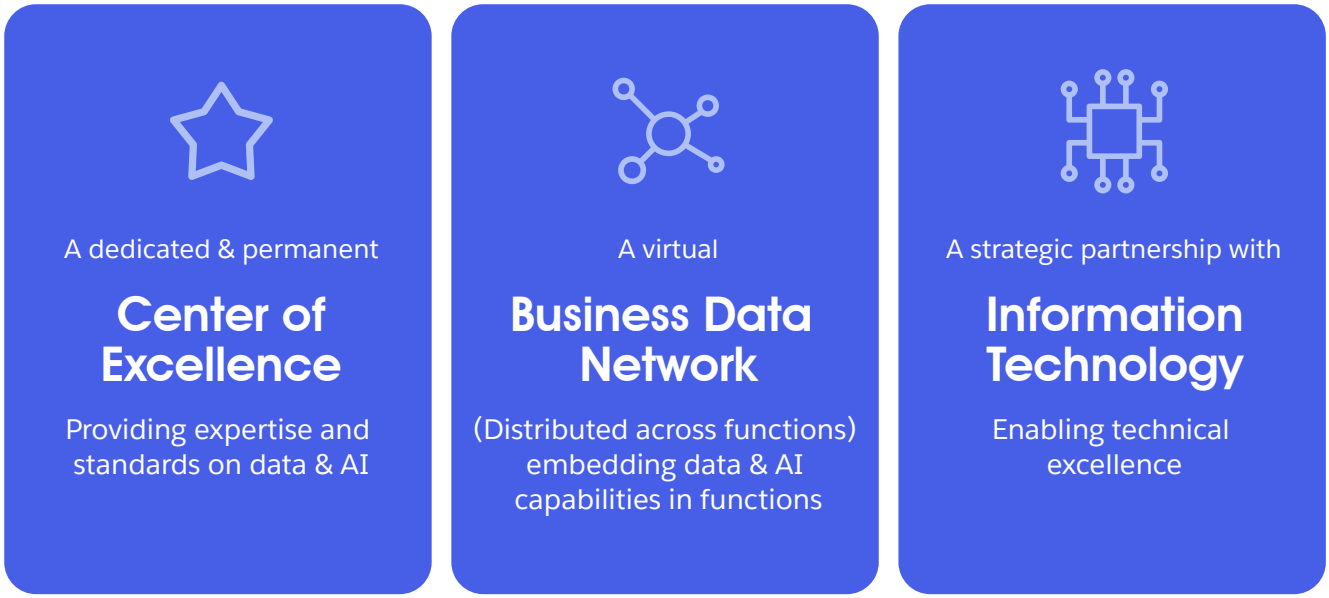
Section Three

Organizational Model

Tableau Blueprint

Organizational Model

The agentic era demands an organizational model that goes beyond traditional structures. Based on practical experience across industries, the Three-Pillars Organizational Model provides a framework that creates clear accountability while enabling the collaboration necessary for success.



The Three-Pillars Organizational Model

The model addresses fundamental challenges that organizations face in the agentic era. Traditional structures—whether centralized or federated—struggle to balance expertise with agility, and control with innovation. This approach provides a solution by separating concerns while ensuring collaboration.

Organization Model

Each of the three components maintains clear accountability for its domain while working in concert with the others. This creates a dynamic balance where standards enable rather than restrict, innovation flows in multiple directions, business value drives decisions, and risks are effectively managed without stifling progress.

	Center of Excellence (CoE)	Business Data Network	Information Technology
Role	Dedicated Center of Expertise	Distributed Capabilities Across Functions	Technical Foundation
Focus	Physical Unit	Virtual Organization	Strategic Alliance
Nature	Data and AI Expertise – Standards – Innovation and Capability Development – Governance and Quality Control	Business Engagement – Value Realization – Augmenting Business Processes with Data and AI	Infrastructure – Security and Compliance – Operations Excellence

Roles vs. Full-Time Equivalent Employees (FTEs)

The model presented here describes roles and responsibilities rather than specific headcount. Organizations can adapt the staffing model based on their size, maturity, and specific needs.

In mature organizations, certain critical roles might require dedicated FTEs or even teams – for instance, having multiple data and AI experts or a team of solution architects. Conversely, in smaller or emerging organizations, one FTE might cover multiple roles – such as combining data quality and MDM specialist responsibilities, or having the Value Realization Lead also handle innovation activities.

The key is to ensure that all critical responsibilities are covered. As organizations grow and their data and AI capabilities mature, they can progressively separate and specialize roles by dedicating specific FTEs to each function. This flexible approach enables organizations to start their journey with a lean team while having a clear framework for scaling as needs evolve.

Center of Excellence for Data and AI

The Center of Excellence (CoE) is a dedicated organizational unit that serves as the permanent backbone for an organization's comprehensive data and AI capabilities. It provides the expertise, standards, and governance needed for sustainable success. Unlike dispersed teams or temporary initiatives, the CoE creates an enduring foundation that enables both current operations and future innovation.

As organizations transition to the agentic era, the CoE's role evolves beyond traditional analytics support. It must now guide the responsible development of autonomous systems, establish frameworks for human-AI collaboration, and ensure that increasing AI capabilities remain aligned with business objectives and ethical principles.

Format of the Organization

The CoE operates as a permanent structure with dedicated expertise organized around core capabilities:

01. Permanent structure with dedicated experts

Creates a stable foundation for long-term success

03. Matrix approach combining technical and process expertise

Enables both depth and breadth

02. Organized around core processes

Aligns expertise with key organizational needs

04. Clear leadership and accountability

Ensures coordinated action and strategic alignment

This format enables the CoE to develop deep expertise while maintaining the agility needed to address evolving requirements. It creates clear ownership for critical capabilities while fostering collaboration across teams.

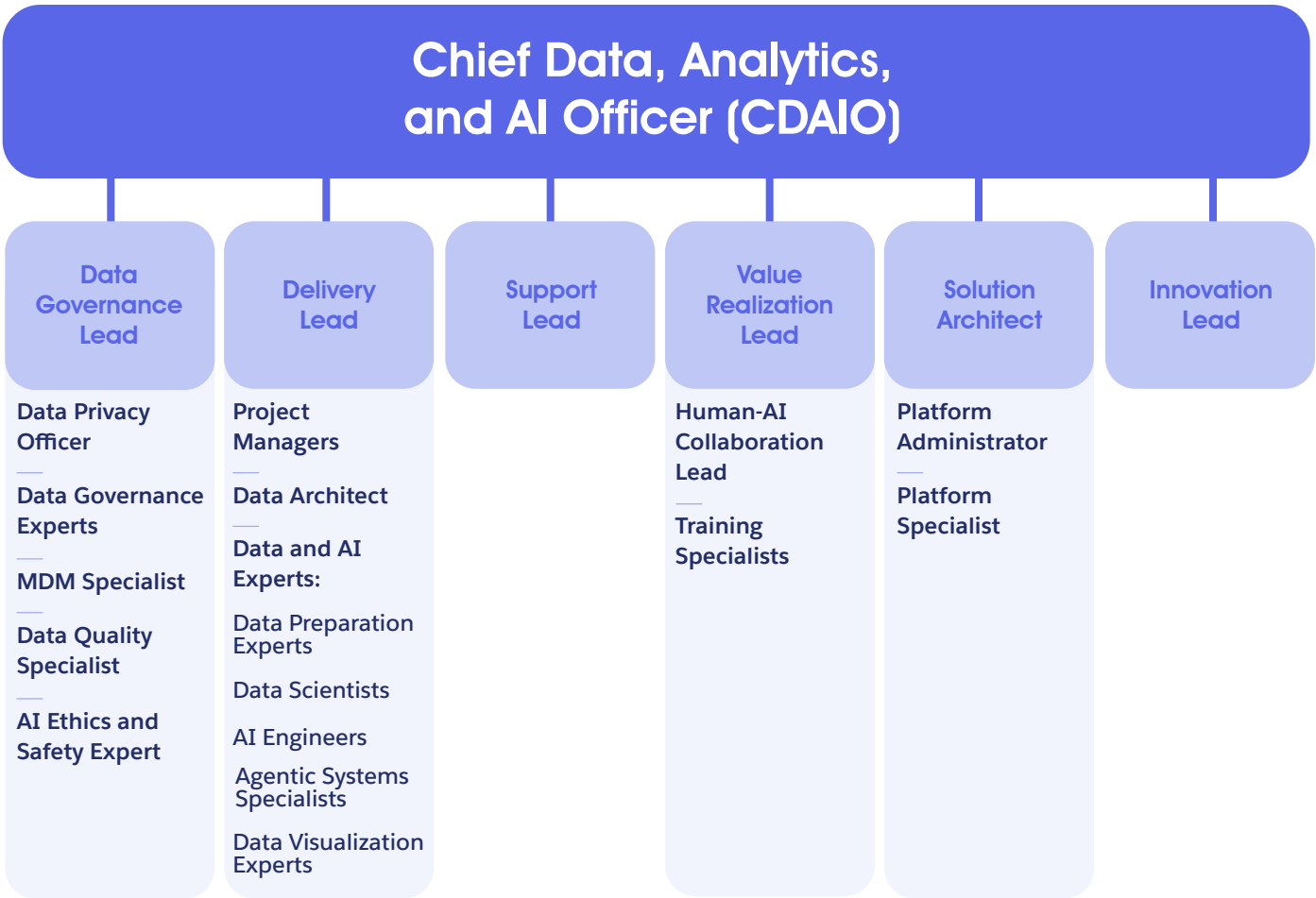
Mission and Purpose

The CoE fulfills several essential purposes in your organization's data and AI ecosystem:

- Provide strategic direction and expertise
- Establish standards and governance
- Drive innovation and capability building
- Ensure quality and consistency
- Drive adoption and communication
- Enable value realization at scale
- Orchestrate human-AI collaboration

Typical Structure of a CoE

The CoE brings together diverse teams of specialists, aligned by core process, each focusing on critical aspects of data and AI excellence:



Core CoE Roles and Responsibilities

The below describes core roles and responsibilities rather than specific headcount. Organizations can adapt the staffing model based on their size, maturity, and specific needs.

Executive Leadership

CDAO (Chief Data & Analytics Officer):

Provides strategic direction for all data and AI initiatives, champions data culture, secures executive support, and ensures business value alignment while overseeing the entire Center of Excellence.

Program Management

Data Governance Lead:

Orchestrates enterprise-wide data governance frameworks, coordinates policy implementation across domains, and ensures data is properly managed as a strategic asset.

Delivery Lead:

Manages the portfolio of data and AI projects, ensures methodology consistency, optimizes resource allocation, and drives successful solution implementations.

Support Lead:

Establishes and maintains the operational support model, monitors service quality, coordinates support resources across pillars, and ensures data and AI solutions remain reliable and functional after deployment.

Value Realization Lead:

Develops frameworks to measure and maximize business impact from data and AI investments, tracks benefits realization, and reports value creation metrics.

Innovation Lead:

Identifies emerging technologies and approaches, facilitates experimentation, and accelerates adoption of innovative data and AI capabilities.

Solution Architect:

Provides technical leadership across projects, establishes solution patterns, ensures architectural consistency, and bridges business requirements with technical implementation.

Business Data Network

This virtual organization embeds data and AI capabilities within business functions, creating a network of roles that drive adoption and value creation. Unlike the CoE, it operates through defined roles rather than dedicated positions, enabling scale while maintaining business alignment.

The Business Data Network represents a critical innovation in organizational design for the agentic era. Unlike traditional centralized teams or isolated pockets of expertise, this network creates a distributed yet coordinated system of roles embedded within business functions. It serves as the vital bridge between technical capabilities and business value, ensuring that data and AI investments translate into tangible outcomes.

Format of the Organization

Virtual structure spanning all functions

Creates connections across the enterprise without disrupting existing reporting relationships

Role-based rather than position-based

Defines responsibilities that can be fulfilled by existing team members

A set of predefined roles for each function

Ensures consistent capabilities while respecting functional differences

Progressive capability model

Provides clear development paths from basic consumption to strategic leadership

This format enables organizations to build data and AI capabilities at scale without reorganizing existing teams. It respects functional expertise while creating cross-functional connections that facilitate knowledge sharing and collaborative problem-solving.

Mission and Purpose

The Business Data Network serves several critical purposes in the organization's data and AI journey:

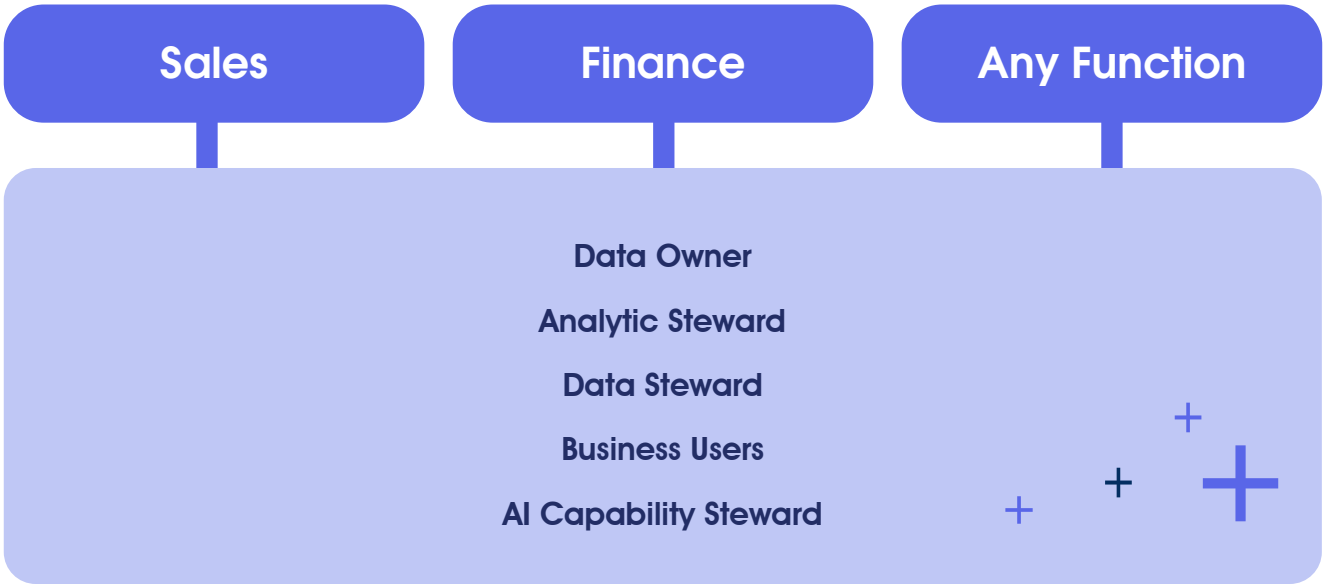
- Bridge technical capabilities with business needs
- Drive local value realization
- Enable effective human-AI collaboration
- Accelerate adoption and transformation
- Build data culture throughout the organization

As organizations progress in the agentic era, this network becomes increasingly vital—not only for adoption but for governance, ensuring AI systems remain aligned with business values and operating within appropriate boundaries.

Typical Structure of a Business Data Network

The Business Data Network establishes a consistent set of roles across each business function, creating a structured capability ladder from data consumers to strategic leaders. These predefined roles ensure enterprise-wide consistency while allowing adaptation to each function's specific context.

For functions early in their data journey, the CoE can temporarily fulfill certain roles until internal capabilities develop. This flexible approach enables organizations to implement the network progressively, starting with critical roles and expanding as maturity increases.



Core Business Data Network Roles and Responsibilities

The below describes core roles and responsibilities rather than specific headcount. Organizations can adapt the staffing model based on their size, maturity, and specific needs.

Executive and Management Roles

Data Owner:

Establishes strategic direction for specific data domains, holds accountability for data quality and proper usage, instills data culture within their business area, approves domain policies, resolves cross-functional conflicts, and ensures data initiatives align with business objectives.

Domain Specialists

Data Steward:

Implements data governance standards within a specific data domain, maintains data definitions and business rules, resolves quality issues, validates changes, implements privacy controls, and provides domain data expertise during solution development and support.

Analytics Steward:

Champions adoption of analytics within their function, manages the lifecycle of analytics assets from creation to retirement, ensures compliance with data governance, maintains documentation, contributes domain expertise to solutions, resolves usage issues, and measures value realization.

AI Capability Steward:

Monitors AI performance in business context, provides feedback on accuracy and relevance, documents business rules for AI training, validates outputs, identifies enhancement opportunities, builds local understanding of AI capabilities, and guides effective human-AI collaboration.

IT Partnership

Unlike the Center of Excellence and Business Data Network, the IT organization typically exists as an established function within the enterprise. Rather than creating a new structure, success in the agentic analytics era requires transforming how IT partners with other pillars to enable data and AI capabilities.

This partnership represents a strategic alliance that bridges technical infrastructure and business value. IT brings critical capabilities in platform management, security, integration, and operations that form the foundation for data and AI solutions. As autonomous systems become more prevalent, this foundation must evolve to support new requirements while maintaining enterprise standards.

The effectiveness of the Three-Pillars Organizational Model depends significantly on how well IT integrates with the CoE and Business Data Network. This requires moving beyond traditional customer-supplier relationships and building true partnerships that solidify technical excellence enables business innovation.

Partnership Model

The IT partnership operates through clearly defined interactions with the CoE and Business Data Network, creating an integrated ecosystem that maximizes value while maintaining appropriate specialization.

IT and CoE Partnership:

IT provides the platform foundation and operational expertise, while the CoE brings data and AI-specific knowledge. Together, they collaborate on architecture decisions, platform selection, security frameworks, and technical standards.

IT and Business Data Network Partnership:

IT provides technical support and ensures platform access. The Business Data Network identifies requirements, champions adoption, and provides feedback on technical solutions.

The effectiveness of these partnerships depends on several critical factors: shared objectives that align technical and business priorities, clear accountability that prevents confusion, and regular communication that builds mutual understanding. As organizations deploy more autonomous systems, these partnerships must evolve to address new challenges in AI operations, security, and governance.

Core IT Roles in Data and AI Initiatives

The below describes core roles and responsibilities rather than specific headcount. Organizations can adapt the staffing model based on their size, maturity, and specific needs.

Executive

CIO:

Aligns IT strategy with data and AI initiatives, ensures appropriate technology investments, advocates for enterprise architecture and security considerations, establishes technical guardrails, and provides IT perspective in cross-functional prioritization decisions.

Architecture and Governance Roles

Enterprise Architect:

Provides technical feasibility assessments, ensures alignment with enterprise architecture standards, identifies technical dependencies and integration requirements, leads architectural governance processes, and develops reference architectures and patterns.

Data Protection Officer:

Ensures data governance frameworks address regulatory requirements, leads privacy control implementation, reviews data protection measures, evaluates architecture proposals for privacy implications, and ensures compliance with privacy regulations.

Platform and Operations Roles

Platform Owner:

Implements governance controls within data platforms, advises on platform capabilities and limitations, oversees platform operations and performance, coordinates maintenance and updates, and ensures designs align with platform standards.

ITSM Lead:

Defines service management processes for data and AI systems, ensures appropriate support model implementation, coordinates incident management across support levels, provides service level reporting, and facilitates continuous service improvement.

Running Core Processes

Each core process is driven by a dedicated work group that brings together members from all three pillars:

Core Process	Group	CoE Center of Excellence	Business Data Network	Information Technology
Program Steering	Steering Committee	CDAO	Data Owners	CIO
	Program Office	CDAO Data Governance Lead Delivery Lead Support Lead Value Realization Lead Solution Architect	-	Enterprise Architect
Data Governance	Data Governance Council	Data Governance Lead Data Privacy Officer AI Ethics and Safety Expert	Data Owners	Data Protection Officer
	Data Governance Group	Data Governance Lead Data Governance Experts	Data Stewards	Platform Owner
	MDM Group	Data Governance Lead MDM Specialist	Data Stewards	Enterprise Architect Platform Owner
	Data Quality Group	Data Governance Lead Data Quality Specialist	Data Stewards	-
	Data Protection and Security Group	Data Privacy Officer	Data Stewards	Data Protection Officer
Solution Delivery	Solution Delivery Committee	Delivery Lead Solution Architect Data Governance Lead Value Realization Lead	Data Owners	Development Lead Enterprise Architect Platform Owner
	(one) Project Team	Project Manager Data and AI Experts Solution Architect Platform Specialist	Data Steward Analytic Steward AI Capability Steward	Developers Data Engineers
Operational Support	Operational Support Committee	Support Lead	Data Owners	ITSM Lead
	L1 Support	-	-	Service Desk Agents
	L2 Support	Platform Administrator Data Quality Specialist	Data Stewards Analytic Stewards	Technical Support Team Platform Owner
	L3 Support	Data and AI Experts Solution Architect	AI Capability Stewards Data Owners	Developers Security Team
Value Realization	Value Realization Committee	Value Realization Lead Innovation Lead Human-AI Collaboration Lead	Data Owners	-
	Value Tracking Group	Value Realization Lead	Analytics Stewards AI Capability Stewards	-
	Analytics Governance	Platform Administrator	Analytics Stewards	-
	AI and Analytics Community	Value Realization Lead Innovation Lead Human-AI Collaboration Lead	Analytics Stewards AI Capability Stewards Business Users	-
Architecture Management	Architecture Review Board	Solution Architect Platform Administrator	-	Enterprise Architect Data Protection Officer Platform Owner
	Architecture Design Group	Solution Architect Data Architect	-	Enterprise Architect Platform Owner Security Team

Section Four

Deployment Approach

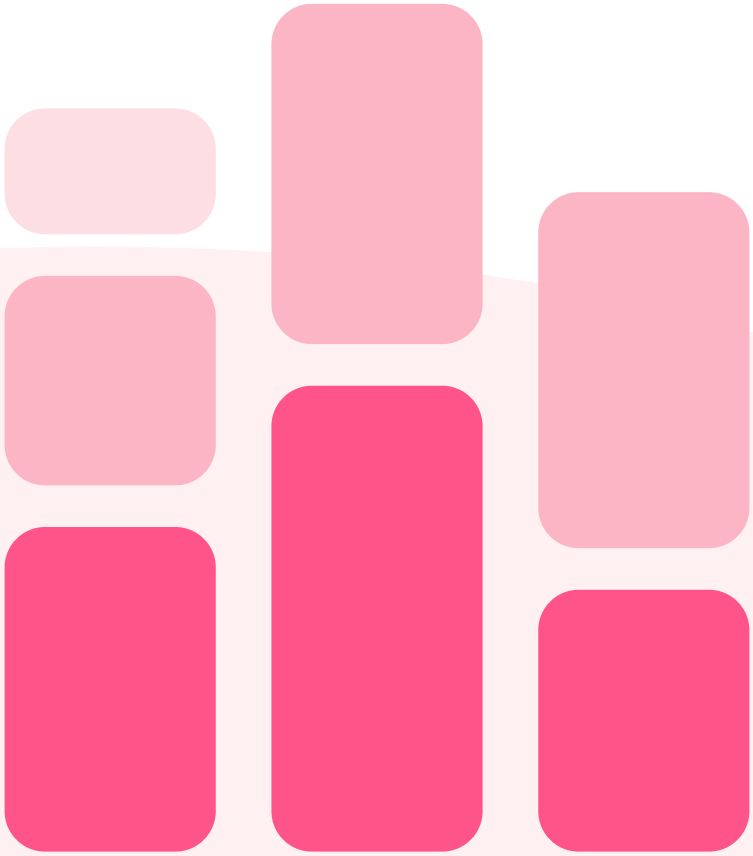


Tableau Blueprint

The Journey from Strategy to Reality

Organizations embark on their data and AI journey with varying levels of maturity, industry contexts, and technical capabilities. Regardless of the starting point, successful implementation requires a balanced approach that delivers business value while building sustainable capabilities.

The implementation roadmap spans three progressive phases – Ignite, Empower, and Outperform – each building on the previous one to create a natural progression from initial momentum to sustained excellence.

The Three-Phase Implementation Approach

This approach operates simultaneously at two essential levels:

Business Enablement
Empowering business functions with data and AI capabilities, delivering tangible value through strategic use cases and capability building.

Framework Development
Deploying the underlying foundation– processes, organization, and architecture – that will sustain and scale capabilities over time.

Doing so creates a virtuous cycle where:

Business value drives adoption and investment

Robust processes and organization enable consistent delivery

Each level reinforces the other

Implementation
Phases Overview

Phase	Timeframe	Business Enablement	Framework Development
Ignite	1-3 months	Showcase a strategic use case	Set up the foundations
Empower	6-12 months	Deploy across all functions	Enable & rollout incrementally
Outperform	Ongoing	Elevate excellence	Sustain & accelerate growth

Critical Success Factors

Honest assessment of your starting point

Balanced approach delivering business value while building capabilities

Appropriate scaling of both ambition and implementation

Executive sponsorship and active stakeholder engagement

Continuous adaptation based on organizational learning

The following pages provide detailed guidance for **each phase of the implementation journey.**

The Ignite Phase: Creating Momentum

Timeframe - 1-3 months

The Ignite phase marks the critical transition from strategy to execution, creating visible momentum while establishing essential foundations for sustainable growth.

Objectives

- Demonstrate tangible business value through a strategic use case
- Begin building essential frameworks that will enable scale
- Create organizational energy and alignment for the journey ahead
- Establish patterns and practices that can be replicated

Level 1: Empowering the Business

01. Select a Strategic Use Case

- Address a recognized business pain point
- Ensure clear, measurable value impact
- Choose something achievable within 2-3 months
- Ensure visibility at leadership levels

02. Form an Agile Delivery Team

- Assemble your “A-team” with your best talent
- Ensure executive air cover and streamlined processes
- Incorporate key stakeholders (executive sponsor, end users, subject matter experts)

03. Execute Rapid Implementation

- Establish clear scope and success metrics
- Adopt a hyper-iterative approach (1-week sprints)
- Focus on user experience and adoption from day one
- Implement technical excellence practices
- Manage risks proactively
- Leverage accelerators and shortcuts where appropriate

04. Showcase Success

- Measure and document tangible impact
- Craft a compelling narrative for different stakeholders
- Conduct strategic demonstrations for key audiences
- Leverage multiple communication channels
- Connect success to future possibilities
- Recognize and celebrate contributors

Level 2: Deploying the Framework

01. Establish Minimal Governance

- Focus primarily on Program Steering and Architecture Management
- Designate an interim Steering Committee with key stakeholders
- Identify Data Owners for domains critical to your use case
- Define streamlined delivery methodology for initial projects

02. Deploy Foundation Architecture

- Prioritize essential components only (core data platform, environments, security)
- Leverage IT partnership (joint architecture sessions, shared standards)
- Build for the future (scalability, flexibility for AI evolution)
- Focus on quality over comprehensiveness

03. Initialize Organizational Structure

- Identify initial members for each pillar (CoE, Business Data Network, IT)
- Establish coordination mechanisms across pillars
- Define team roles and responsibilities with clear RACI matrices
- Create initial capability building plan

04. Develop Implementation Roadmap

- Document capability gaps revealed during implementation
- Identify next-wave business opportunities
- Update resource requirements
- Create communication and change management plans

Success Indicators

- Completed high-visibility use case with measurable business impact
- Established minimal viable governance and architecture foundations
- Formed nucleus of the three-pillar organizational model
- Developed clear roadmap for the Empower phase
- Created enthusiasm and support for the broader data journey

The Empower Phase: Scaling Capabilities

Timeframe - 6-12 months

The Empower phase represents a critical expansion of your data and AI journey. While the Ignite phase created momentum through focused success, Empower builds enterprise-wide capabilities through systematic deployment across business functions.

Objectives

- Scale data and AI capabilities across functions in a prioritized sequence
- Formalize core processes and organizational structures
- Mature governance frameworks and working groups
- Complete the Three-Pillar Organizational Model

Level 1: Scaling Across Functions

01. Prioritize Function Deployment

- Define deployment waves based on strategic importance and readiness
- Create function-specific value propositions linked to business priorities
- Secure leadership commitment for each wave of functions
- Prepare implementation approaches tailored to each function

02. Implement Function-Specific Use Cases

- Select 1-2 high-impact opportunities for each function
- Establish implementation teams that enable knowledge transfer
- Execute delivery using standardized processes and proven patterns
- Monitor value creation with clear metrics

03. Build Function Capabilities

- Deploy key roles within the Business Data Network
- Build data literacy through function-specific training
- Enable progression from CoE-led to function-led initiatives
- Document and share learning through playbooks and repositories

04. Drive Adoption and Value Realization

- Measure and accelerate adoption with targeted metrics
- Establish rigorous value tracking mechanisms
- Support ongoing solution evolution based on feedback
- Ensure sustainable operations with clear support processes

Level 2: Maturing the Framework

01. Formalize Core Processes

- Establish full governance framework with all working groups
- Formalize solution delivery methodologies and stage gates
- Mature support model with comprehensive L1/L2/L3 structure
- Systematize value realization tracking and reporting

02. Build Out Organizational Structure

- Complete Center of Excellence with all teams and capabilities
- Expand Business Data Network with role activation playbooks
- Strengthen IT Partnership through formal governance
- Implement cross-pillar coordination forums and decision rights

03. Enhance Technical Foundation

- Scale platform capabilities to support enterprise-wide operations
- Strengthen security and compliance controls
- Build reusable components and solution patterns
- Enhance integration capabilities and data models

04. Implement Change Management

- Develop communication strategy with consistent messaging
- Create comprehensive role-based training programs
- Build support networks and communities of practice
- Implement recognition systems that celebrate success

Success Indicators

- Clear deployment roadmap covering all business functions
- First wave of functions fully enabled and driving their own initiatives
- All functions aware of their deployment timeline and preparing accordingly
- Established roles and responsibilities across all three pillars
- Measurable value creation from function-specific use cases
- Sustainable operational models and governance structures

The 'Outperform' Phase: Sustaining Excellence

Timeframe - Ongoing

The Outperform phase marks a fundamental shift in your data and AI journey, transforming data and AI excellence into a sustainable competitive advantage.

Objectives

- Drive operational excellence across all data and AI capabilities
- Enable continuous innovation with emerging technologies
- Optimize existing processes while pushing future boundaries
- Create a culture of continuous learning and evolution

Level 1: Driving Business Excellence

01. Optimize Function Performance

- Fine-tune existing analytics and AI solutions
- Maximize value creation through deeper impact
- Build operational excellence in data workflows
- Drive continuous improvement through feedback loops

02. Enable Advanced Capabilities

- Advance analytics maturity from descriptive to predictive and prescriptive
- Expand AI implementation with autonomous agents and automation
- Deepen domain expertise with specialized models and algorithms
- Enable cross-function capabilities for integrated analytics and insights

03. Foster Innovation and Experimentation

- Create innovation spaces and experimentation environments
- Drive systematic innovation through structured processes
- Enable collaborative innovation across functions
- Manage a balanced portfolio of innovation initiatives

04. Create Value Networks

- Build cross-function synergies with integrated solutions
- Develop external partnerships with ecosystem players
- Enable value amplification through network effects
- Sustain network growth with active relationship management

Level 2: Enhancing Enterprise Foundation

01. Optimize Core Processes

- Enhance process efficiency by streamlining workflows
- Strengthen governance while balancing control and agility
- Improve delivery excellence and quality management
- Perfect support operations and knowledge management

02. Evolve Operating Model

- Refine organizational alignment across the three pillars
- Deepen specialized capabilities and expertise
- Improve operational dynamics and resource allocation
- Foster adaptive leadership and strategic alignment

03. Advance Technical Capabilities

- Enhance platform capabilities through architecture evolution
- Implement emerging technologies after strategic evaluation
- Perfect DataOps and AIOps with comprehensive automation
- Strengthen security posture and AI safety mechanisms

04. Build Future Readiness

- Develop strategic foresight on technology trends and disruptions
- Create adaptable foundations with flexible architectures
- Foster experimental capabilities for rapid testing
- Manage strategic risks and emerging threats

Success Indicators

- Functions independently innovating with data and AI
- Measurable and continuous performance improvements
- Systematic approach to testing and scaling new ideas
- Growing portfolio of differentiated capabilities
- Robust yet flexible operations enabling adaptation
- Clear competitive advantages from data and AI capabilities
- Culture where data excellence is part of organizational DNA

The Dual Mission of the Outperform Phase

Optimization Focus

- Maximize solution effectiveness
- Enhance efficiency of existing processes
- Build predictable, reliable operations
- Optimize resource utilization
- Systematize quality improvement

Innovation Focus

- Explore emerging AI technologies
- Create safe spaces for experimentation
- Foster innovation networks across functions
- Push boundaries of what's possible
- Scale successful innovations

Looking Ahead

The Outperform phase isn't the end of your data and AI journey but a sustainable state of continuous advancement.

Adapting to Constant Evolution

Data and AI technologies are in perpetual evolution, with breakthroughs emerging at an accelerating pace. The frameworks and approaches outlined in this book aren't rigid prescriptions but adaptable patterns that must evolve with these changes. Your organization should continuously reassess and refine this model to reflect your unique context, challenges, and opportunities.

The Evolving Agentic Era

Agentic analytics and autonomous AI systems will continue to evolve, creating new possibilities for human-AI collaboration and business transformation. Organizations that maintain their Outperform discipline will be best positioned to embrace these changes, using their adaptive foundation to capitalize on emerging opportunities while managing new risks.

Reimagining Possibilities

As your organization masters current capabilities, you can begin exploring entirely new business models, products, services, and ways of working. The most advanced organizations will move beyond using data and AI to improve existing operations and begin creating entirely new sources of value that weren't previously possible.

The journey you've undertaken isn't about reaching a destination but developing the capability to continuously advance. By building robust foundations while fostering innovation, you've created an organization that can navigate the agentic era and even help define it.

Take the next step in your data and AI journey

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Speak to the team

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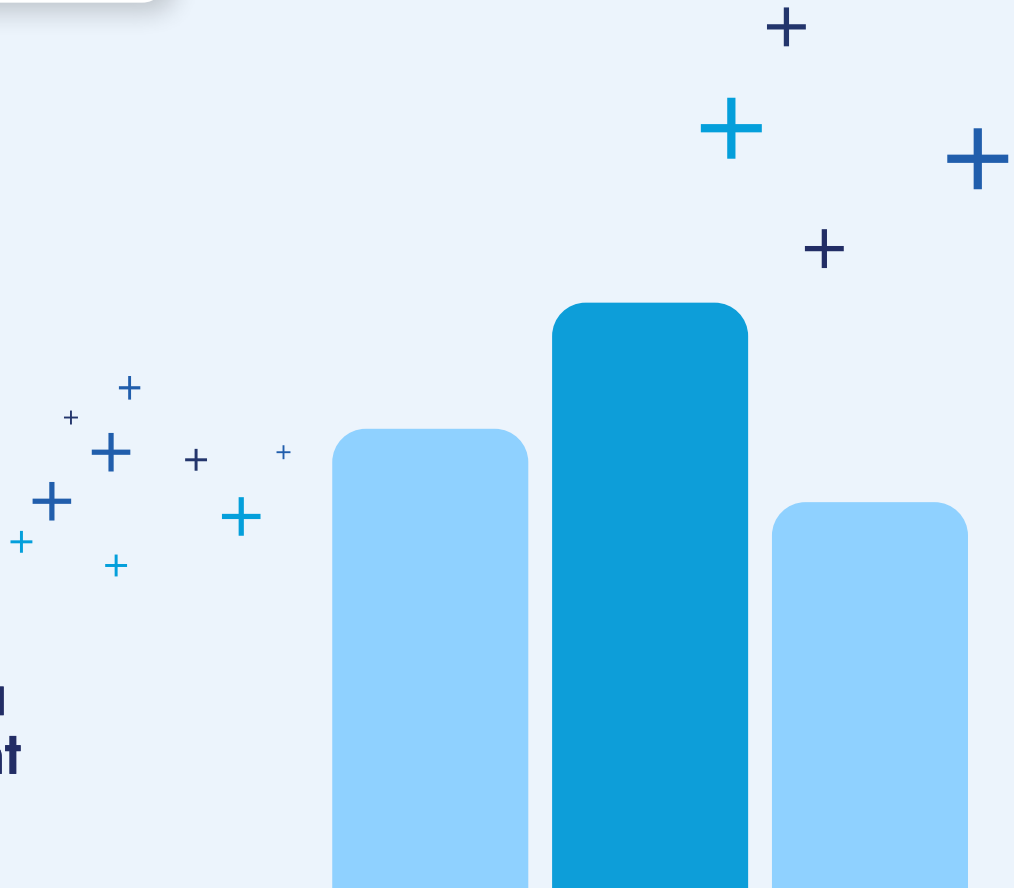

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