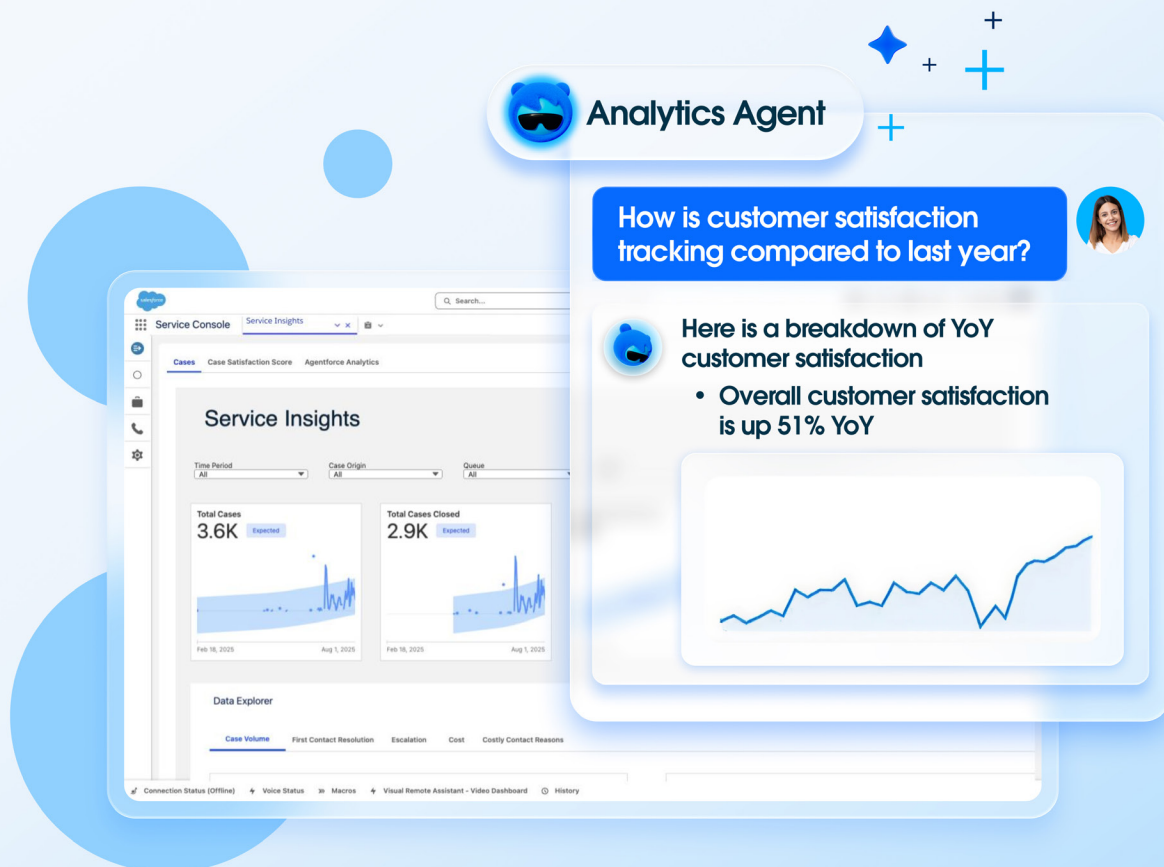




Tableau Next and the Headless 360 Platform Advantage

How a deeply unified platform powers proactive, always-on agentic analytics



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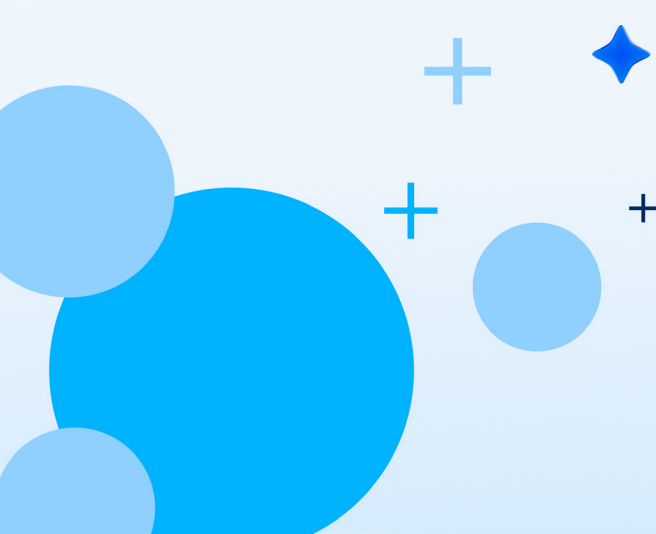
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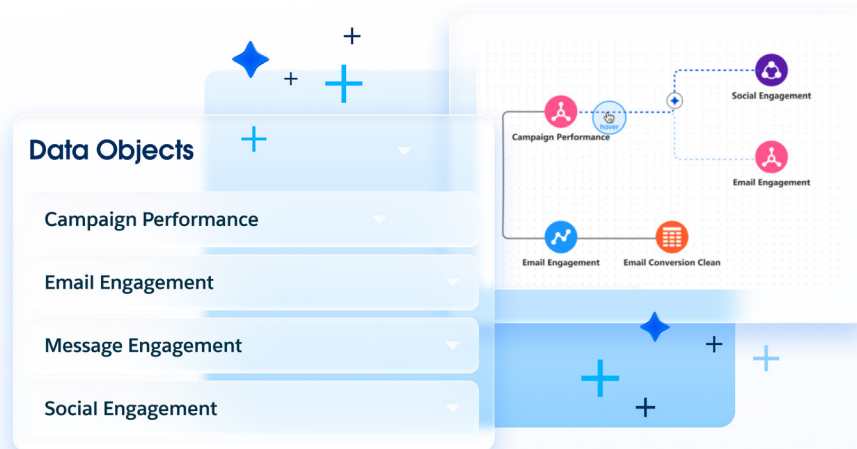
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Turn Data into Action: Analytics for the Agentic Enterprise



Data and analytics are table stakes for companies to be successful, competitive, and operationally efficient. However, with an increasingly complex and fragmented data landscape, many organizations struggle to find and act on meaningful insights. Business leaders are losing confidence in their data's relevance, reliability, and accuracy.



This crisis of trust is widespread: organizations estimate that 26% of their data is untrustworthy, and a lack of complete or quality data is the top factor preventing them from being data-driven. Furthermore, data silos are not just a technical problem; 52% of leaders report they have a severe or moderate impact on hindering decision-making.

Source: [Salesforce State of Data & Analytics Report, 2nd Edition](#)

Part of the challenge stems from data being dispersed across myriad different systems, making it hard to get a complete view. Plus, different teams may define metrics differently, leading to inconsistent or untrustworthy results.

Without unified data and a single source of truth, analysts are left chasing information, managing tedious tasks, and struggling to piece together the full picture. Many also lack the time or tools to effectively analyze, visualize, and efficiently share the data that they do have.

Tableau Next, a revolutionary agentic analytics solution, addresses these gaps with data, metadata, apps, and AI all on one code base — Salesforce's Headless 360 platform. Tableau Next combines 20+ years of intuitive and effective analytics experience with Salesforce's renowned world-class infrastructure and agentic AI layer, Agentforce. This helps businesses go from data-rich but insight-poor, to having a complete view of unified data with personalized, contextualized, and actionable insights directly in the flow of work.

In this guide: What it takes to make agentic analytics work

Implementing agentic analytics is a strategic imperative involving complexity, risk, and significant investment. This guide will help you answer critical questions every leader is facing:

- ☒ **Security:**
How can we harness the power of large language models (LLMs) without sacrificing enterprise-grade security, governance, and data privacy?
- ☒ **Trust:**
How can we unify our fragmented data and build a foundation of trust so that AI agents — and our people — operate from a single source of truth?
- ☒ **Action:**
How can we finally close the gap between insight and action, moving beyond dashboards to a world where analysis, action, and automation are integrated in our business processes?
- ☒ **Scale:**
How do we empower everyone in the organization — not just data scientists — to safely leverage agentic analytics without relying on specialized developers or lengthy, expensive development cycles?

You'll learn how Tableau Next, on the deeply unified Headless 360 platform, makes this possible through trusted and scalable agentic analytics.

Deploy accurate agents with a deeply unified platform

Predictive and generative AI have already reshaped how organizations operate, but the technology's next stage of evolution is here with agentic AI. Agents can use context, guardrails, and appropriate data to perform deep analysis and take specified actions without the need for constant human input. This introduces new possibilities for automation, autonomy, and end-to-end efficiencies beyond AI assistance.

In an agentic enterprise, agents and people work together, seamlessly turning data into action. This means AI is no longer a tool — it's a teammate. Employees can focus on high-value work like relationship building and strategy while agents take on routine tasks like scheduling or recapping meetings, performing deep analysis, and even building data models and dashboards.

Agentic analytics

Agentic analytics moves beyond the limitations of traditional BI by amplifying human capabilities, increasing productivity, reducing bottlenecks, and driving faster, more confident decisions.

The shift from traditional BI ...

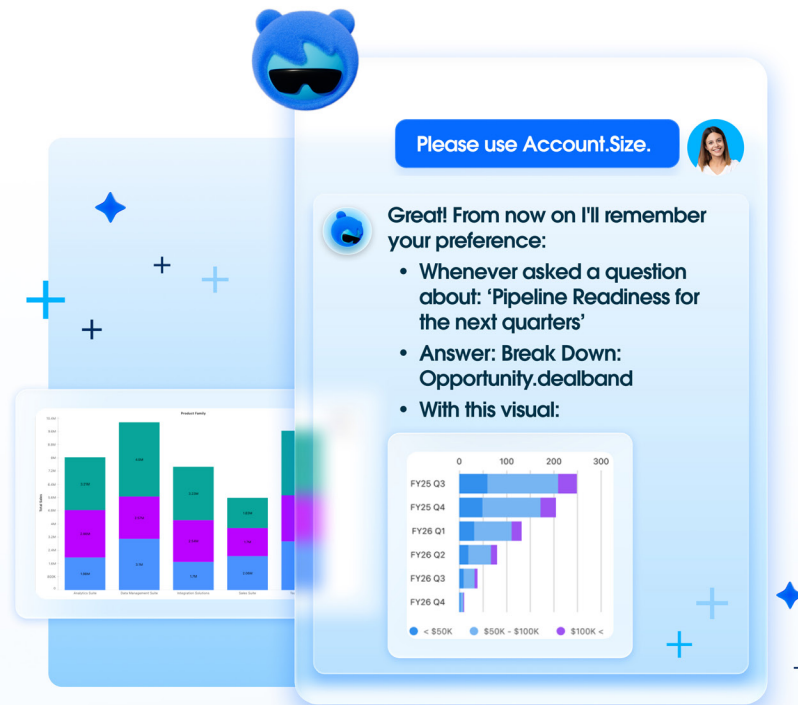
Manual, stale reports. Clunky interfaces. Unanswered questions.

- Disconnected tools and siloed workflows
- Reactive decisions and slow response times
- Heavy reliance on analysts and institutional knowledge

... to agentic analytics.

Smart and adaptive. Actionable. Always on.

- Conversational analytics with intelligent business context
- Adaptive decisions and accelerated actions
- Continuous monitoring and action with intelligent agents



For AI agents to deliver trustworthy insights and actions, they need to access and interpret connected data with meaningful business context. Even with an LLM, setting up models and writing SQL still requires time and expertise. This is where a deeply unified platform shines, bringing together data, metadata, AI, apps, and actionability — all centralized and on one code base.

Built on Salesforce's Headless 360 platform, Tableau Next offers a truly unified analytics experience that leverages the best of both Salesforce and Tableau technologies.

Across Salesforce — and beyond

Salesforce customers benefit from the added value of increased efficiency, deeper insights, and enhanced integration with Tableau Next — including centrally managed user permissions, administration, inherited security, and more. Tableau Next also powers purpose-built analytics across Salesforce Clouds, creating a connected analytics experience optimized for key business functions across Salesforce products.

At the same time, Tableau Next can be used as a standalone agentic analytics platform and integrated with your ecosystem, whether you have invested in Salesforce, Google, Microsoft, or other product suites.

Harness AI confidently with world-class scalability, security, and trust

One of the first questions that comes to mind when talking about AI centers on how to take advantage of its full potential without sacrificing data security and privacy.

As AI advances, 88% believe new data governance approaches are required, yet only 43% have established formal data governance frameworks and policies today.

Source: [Salesforce State of Data & Analytics Report, 2nd Edition](#)

Hyperforce and the AI Trust Layer are designed specifically to help you get the benefits of AI in a secure, compliant manner.

- ☒ **Hyperforce**
[Hyperforce](#) is the next-generation Salesforce infrastructure architecture, built for the public cloud, that enables Tableau Next users to tap into Salesforce's powerful, enterprise-grade security, governance, and scalability. It allows analytics to be safely shared and scaled — even across countries with strict data privacy laws — while complying with local regulations.
- ☒ **AI Trust Layer**
The [AI Trust Layer](#) allows organizations to tap into the power of AI without worrying about compromising their data. It protects the privacy and security of your data through methods like dynamic grounding and zero data retention, and even includes toxicity detection to help ensure trustworthy responses. This helps you benefit from the scale and cost-effectiveness of third-party LLMs while also ensuring your data is protected at each step of the generation process.

These features allow you to benefit from the scale of third-party LLMs while ensuring your data is protected at each step of the generation process.



Discover How it Works: Tableau Next Agentic Analytics



Tableau Next

Empower every CRM user to turn data into action with agentic analytics

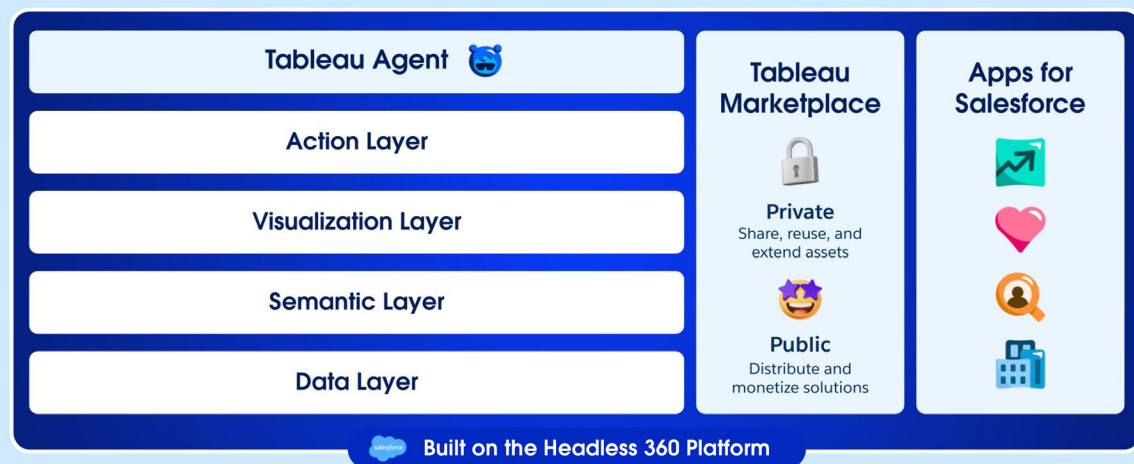


Tableau Next is built on a composable architecture with a unified data layer and trusted semantics. Deeply integrated with Agentforce, it creates a seamless, unified experience that reimagines how organizations can transform their data into action. Any user in an industry can move from data to insight to action in existing workflows without having to swivel-chair between platforms.

Tableau Next is the first open, API-first BI platform with a workflow engine that spans the entire analytics journey from a data layer to a semantic layer, a visualization layer, and an action layer. With the incorporation of agentic AI, a modern marketplace, and purpose-built analytics apps, organizations are empowered with personalized insights to make faster decisions and take meaningful action. Each of these elements is powerful on its own, but when they're combined, they create something truly revolutionary.

Unify fragmented data with an open data layer powered by Data 360

What it is

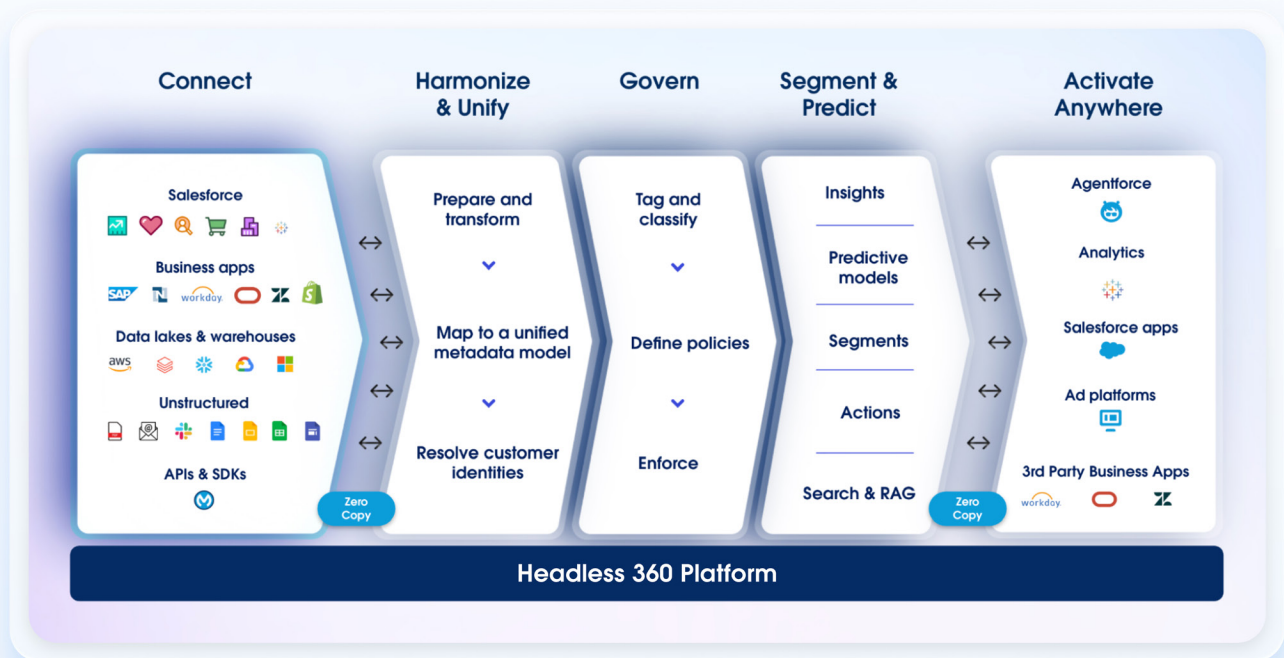
Data 360 is the open data layer of Tableau Next that unifies and harmonizes your data, making it accessible and actionable across your organization.

Why it matters

This foundation of unified data helps employees break down silos and gives agents the trustworthy, business-rich data they need to work for you effectively.

How it works

Data 360 connects and harmonizes disparate data sources from internal systems, Salesforce apps, external applications, third-party systems, and existing data lakes and warehouses like Snowflake, Databricks, or Google BigQuery. With its zero-copy data federation technology, you can access and query data without physically copying or migrating it, reducing costs and enhancing security.



Once unified, you can use the extensive tools and safeguards natively built into Data 360 to ensure governance, security, and compliance. Your data can then be activated across any application, workflow, or agent, allowing you to take action and get trusted outputs faster than ever before.

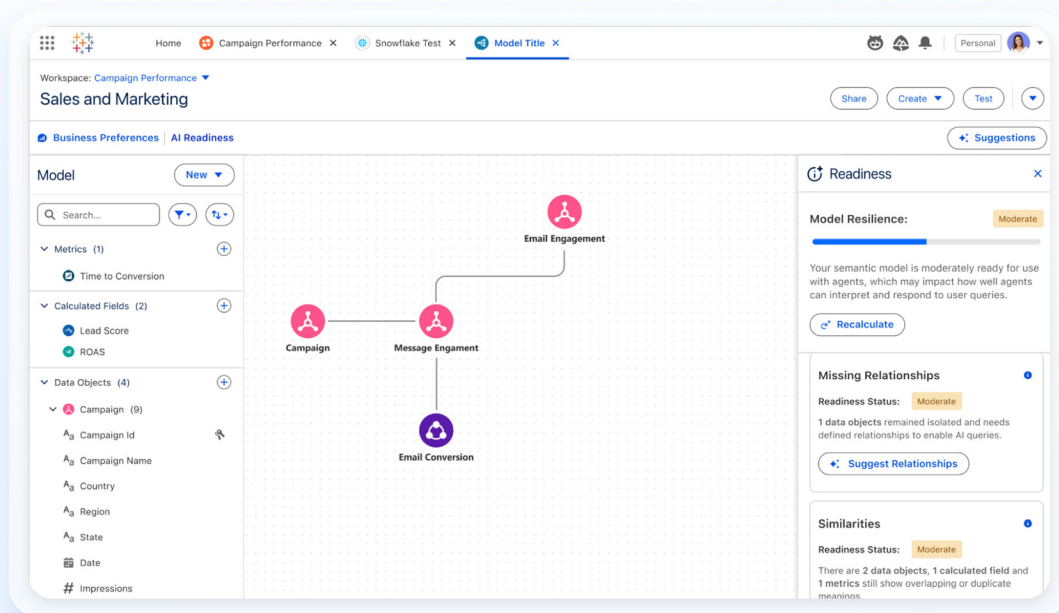
Infuse data with business context using Tableau Semantics, an AI-powered semantic layer

What it is

Tableau Semantics is the AI semantic layer for Tableau Next and all of Salesforce that translates your raw data into your business language.

Why it matters

Tableau Semantics infuses your data with context, ensuring that AI agents and team members have the same understanding of your business terms, like **“win rate”** or **“active lead.”** With this consistent, trustworthy foundation, agents can understand intent and take appropriate actions.



How it works

Tableau Semantics offers a no-code, business-oriented interface for defining and organizing data, metadata, calculated fields, data hierarchy, data types, and relationships. AI-powered semantic modeling and query generation are built in, reducing the manual effort to build semantic data models. This includes automatic relationship suggestions, the ability to create complex, optimized calculations and queries from natural language, and features to assess the AI readiness of models.

Analysts can build composable data sources on centralized, IT-approved models by adding their own data for flexible, ad-hoc analysis without compromising consistency or control. Governance workflows enable organizations to establish a central repository of verified semantic models that can be curated and shared.

Agents can continuously grow their knowledge of a business and preferences through semantic learning and real-time Q&A, including clarifying the user's intent to improve performance over time. Businesses can also calibrate, test, and verify agent responses to ensure users receive accurate, trusted, and consistent answers from conversations.

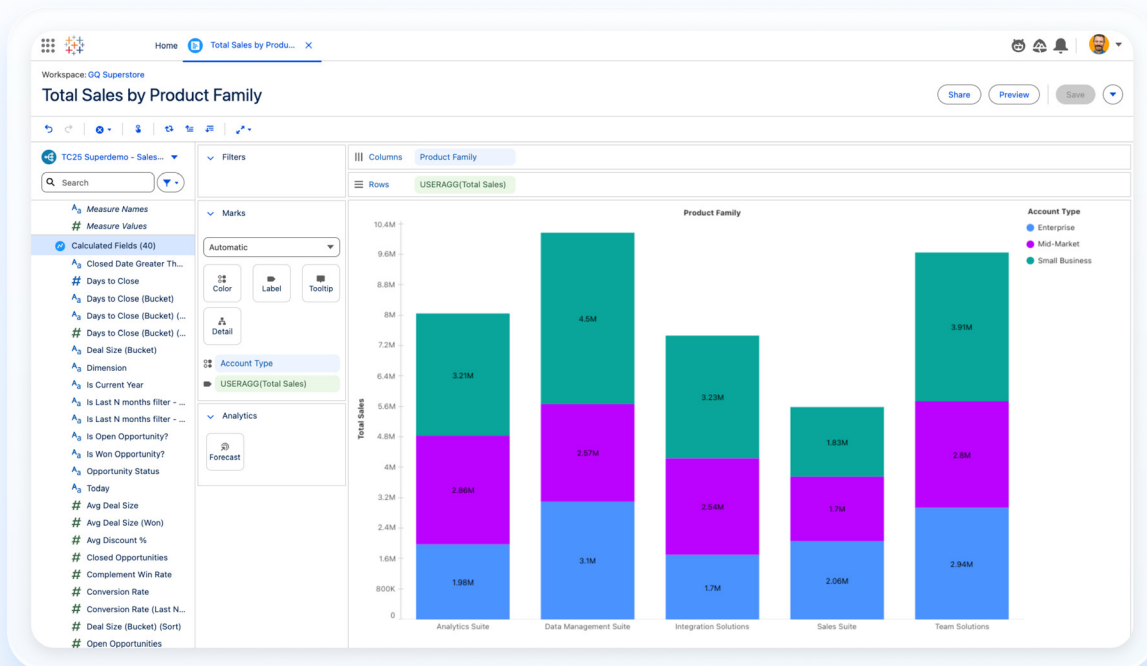
See and understand your data with a powerful visualization layer

What it is

Powerful, collaborative, and composable data visualization capabilities with user-friendly drag-and-drop and natural language tools.

Why it matters

As organizations amass more and more data, it's critical to be able create and share dashboards quickly, while supporting concurrent users at scale.



How it works

Tableau's industry-leading drag-and-drop visual analytics capabilities are now delivered through an efficient, API-first experience built to be more performant, scalable, and cost-effective. Users can interact with metrics and visual responses from an agent, and easily explore fully interactive visualizations further — including predictive and generative AI capabilities that forecast future trends — all within a seamless experience.

Workspaces provide an efficient and intuitive way to navigate assets with complete lineage from data sources and semantic models to visualizations and metrics. Personal spaces combine governance and self-service, giving analysts a safe place to explore data and extend existing semantic data models without affecting the organization's production environment.

Additionally, analysts can reuse and govern composable assets with a shared marketplace that includes metrics, visualizations, dashboards, and more.

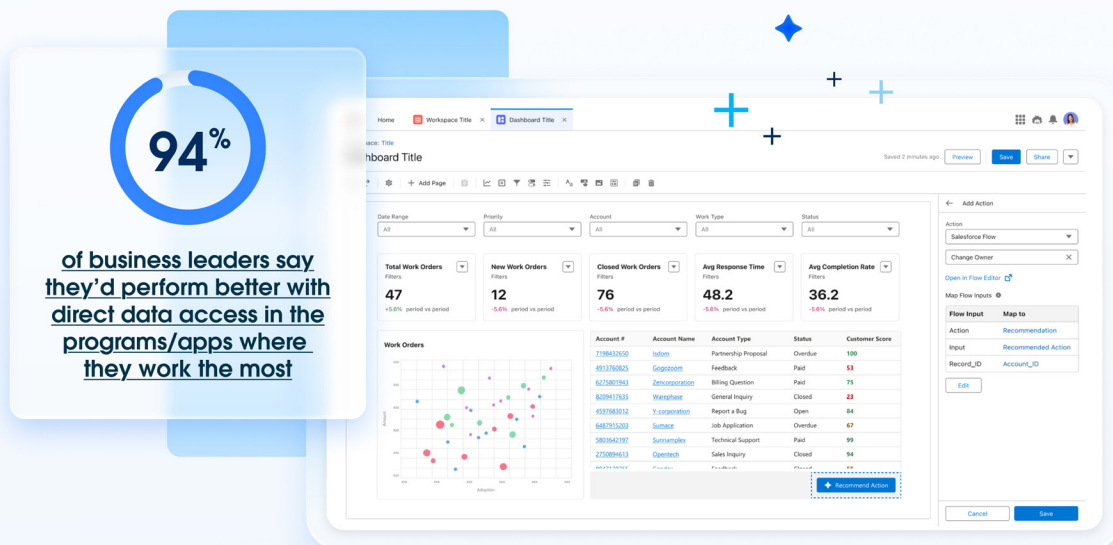
Act on data in the flow of work with an integrated action layer, Salesforce Flow, and MuleSoft

What it is

The integrated ability to trigger automated actions directly from your insights, powered by the robust capabilities of Salesforce Flow and MuleSoft.

Why it matters

Crucial insights are often overlooked simply because they aren't surfaced in the context of users' day-to-day work. Tableau Next addresses this by delivering actionable, personalized, and proactive insights directly into workflows. This means people can take action at the point of insight, without switching between systems.



How it works

Tableau Next leverages the technology of Salesforce Flow and MuleSoft to connect analytics to existing workflows and systems, enabling users to act at the point of insight without the need to swivel-chair or jump between platforms. Whether it's updating a record, creating a campaign, or opening a case, it's easier than ever to turn insights into outcomes.

Through these native integrations, Tableau Next transforms KPIs and traditional dashboards into intelligent interfaces where actions can be taken directly — or delegated to agents who work in the background to automate repeatable tasks, alert users, or trigger workflows based on evolving data in a governed and safe manner.

For example, if an AI agent detects a drop in CSAT scores, it can use Salesforce Flow to automatically escalate the issue to the service team. Agents can suggest actions, simulate outcomes, and initiate processes, all tied back to your semantic model. The AI Trust Layer ensures agents have guardrails and secure, auditable, and compliant workflows.

Scale analytics skills to everyone with Tableau Agent

What it is

Natively integrated with Agentforce, Tableau Next delivers a powerful suite of agentic capabilities with Tableau Agent — spanning data preparation, exploration, analysis, visualization, and proactive monitoring and alerting.

Why it matters

Armed with advanced analytical capabilities, agents can work with people of all data skill levels throughout an organization to streamline analysis and introduce new efficiencies. Natively integrated with Agentforce, Tableau Next makes it possible to create and deploy a network of agents across a business with analytics as a core competency.



of data and analytics leaders say technical queries limit analytics use at scale

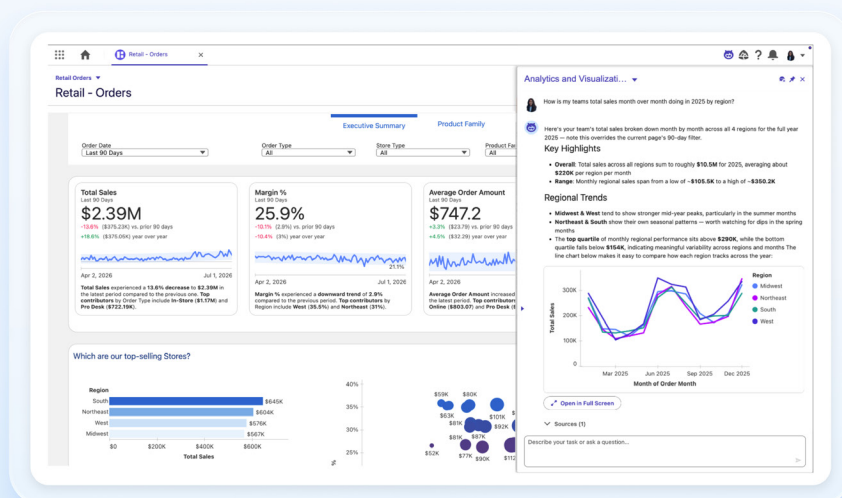


agree that translating business questions into technical queries is prone to error

How it works

Enable trusted conversational analytics

Tableau Agent empowers any user with conversational analytics to get accurate, actionable insights in real time, directly in the flow of work. Users can ask questions in natural language and receive immediate, trustworthy answers grounded in the organization's semantic layer and aligned to its business preferences — including tested and verified answers — to create consistent experiences.

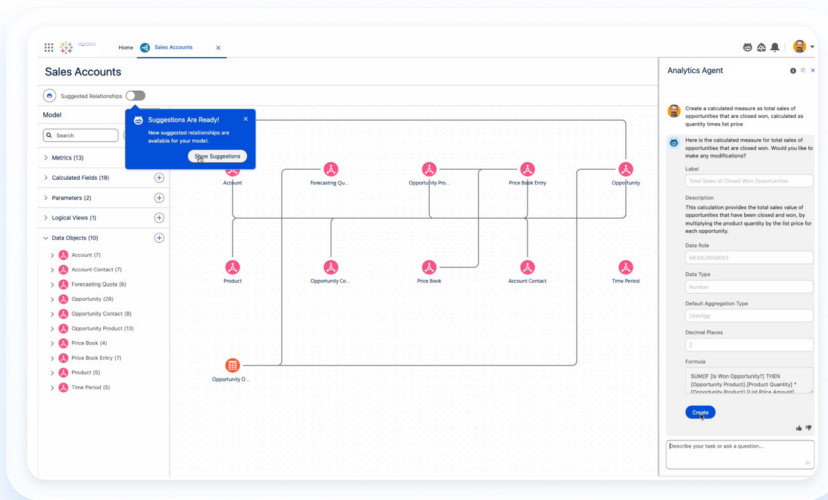


In practice

A retail operations manager can ask, "How are our weekend foot-traffic trends looking in our urban stores?" The agent will understand business-specific terminology and return a data visualization with a summary of insights.

Prepare, model, and visualize data

Analysts can benefit greatly from accelerating workflows and turning data into insights faster. Tableau Agent's data prep, modeling, and visualization capability acts as an intelligent data preparation assistant that can connect and prep data, create calculated fields from natural language prompts, build semantic models, and generate visualizations — turning raw data into insights faster.

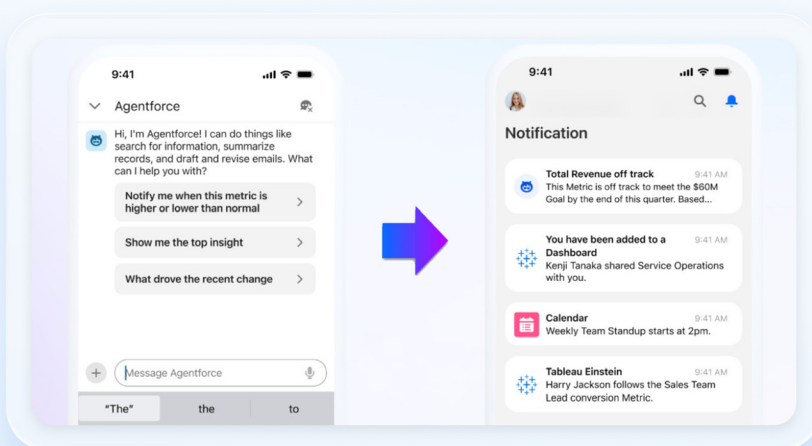


In practice

An analyst can reduce the manual effort of building semantic data models by creating complex calculated fields in bulk with natural language descriptions.

Deliver proactive insights and alerts

Tableau Agent delivers proactive insights, easing the manual burden on data and analytics teams. With always-on agentic monitoring, teams receive proactive alerts when metrics change and stay ahead of trends and anomalies — knowing exactly where the business needs attention to change an outcome before it happens.

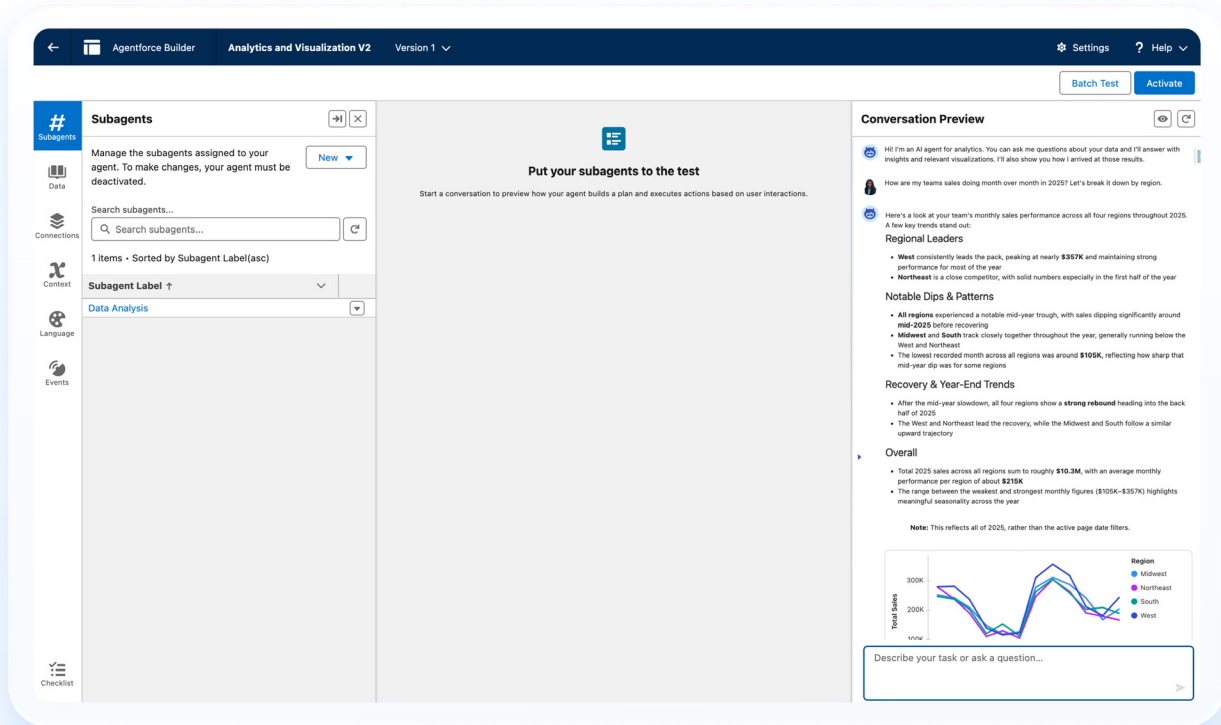


In practice

If an agent notices inventory is running low for a top-selling product, it can send an alert notifying employees to act before the low stock turns into a bigger issue.

Enrich Agentforce with analytics skills

Tableau Next enriches agents across the Salesforce ecosystem with analytical skills so that responses from Agentforce can include data visualizations, not just words. This gives people the ability to quickly get accurate, contextualized insights from Agentforce beyond Tableau Next — including from Sales agents, Marketing agents, Service agents, and more.



Monitor and optimize agent performance

With Tableau Next and Agentforce, organizations can measure the impact of their digital labor workforce with visibility into agent performance and adoption. Instead of guessing, leaders get clear insights into:

- ☒ How agents are being used — tracking adoption across teams.
- ☒ Where agents are falling short — identifying common failure points.
- ☒ What's next for automation — finding new opportunities for agents to add value.

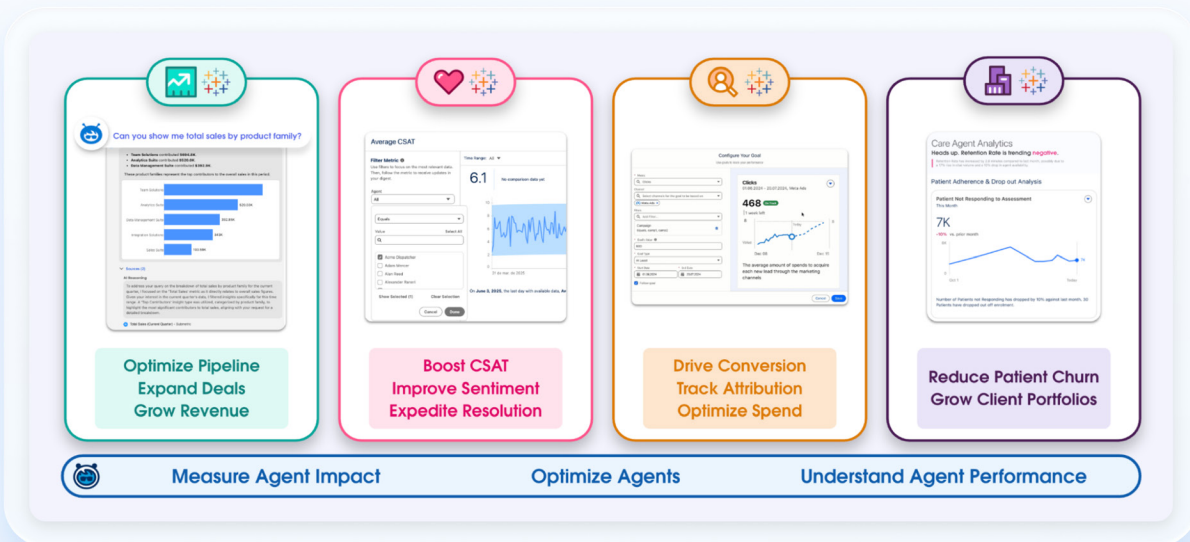
Extend the value of agentic analytics into the flow of work with Headless 360

Scale with a modern marketplace

Analytical building blocks (including dashboards, datasets, semantic models, and more) can be easily combined with out-of-the-box MuleSoft workflows or Agentforce sub-agents, and embedded within Salesforce apps and third-party applications. With a composable architecture, pieces can be used, reused, and customized across teams — which saves time, cuts costs, and enables businesses to scale innovation across the organization.

Empower teams with agentic analytics apps

Tableau Next builds on the Headless 360 platform advantage by providing purpose-built analytics applications for Agentforce Sales, Service, Marketing, Life Sciences and Financial Services industries, and more. This means line-of-business users can get rapid time-to-value with pre-built dashboards, visualizations, and metrics tailored to key functions, offering a more connected, intelligent data and analytics experience across the business.



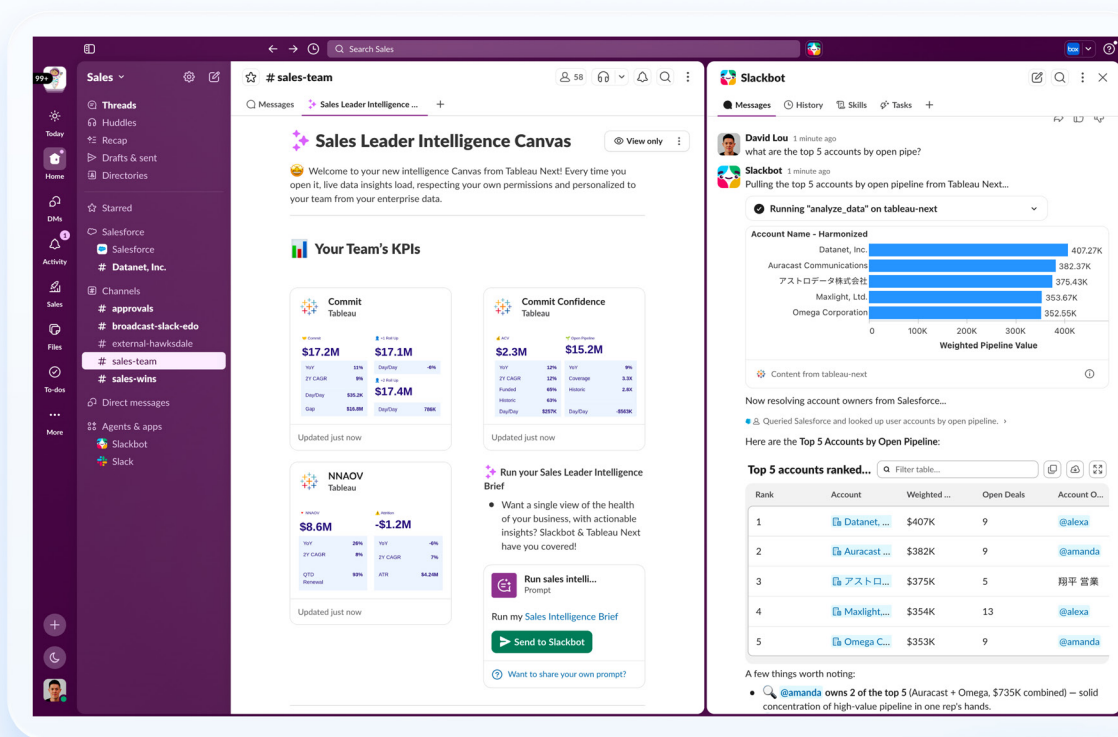
Stay connected on the go with the Salesforce mobile app

Stay informed with real-time access to key metrics and proactive data alerts when trends change. Users can even ask questions to understand what's driving performance and empower informed decisions anytime, anywhere — even on the go.

Boost data-driven collaboration in Slack

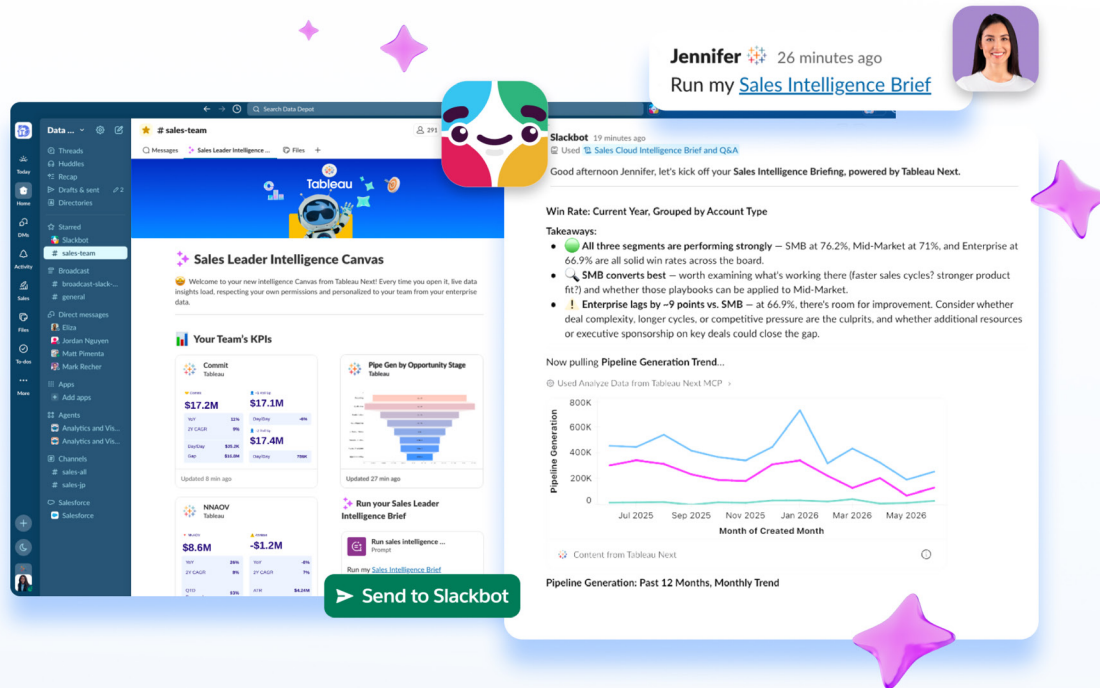
Break down silos and make faster, data-driven decisions with personalized, contextual insights from Tableau Next in Slack. With Tableau Agent in Slack, anyone can ask questions about their data using natural language, get trusted answers and rich visualizations, and take action right where they're already working.

View and share metrics and dashboards in channels, DMs, or canvases, with direct links to Tableau Next. Follow threads in Slack and Tableau Next to keep track of engagement with business data and fuel cross-team collaboration.



Bring trusted analytics into every conversation with Slackbot

Get proactive intelligence briefings and ask questions about your data with Tableau Next and Slackbot. Receive accurate insights and rich visualizations grounded in your business's governed knowledge and take action, all from one conversation.



- ☒ **Proactive intelligence briefings** — get relevant metrics and important trends surfaced before you ask
- ☒ **Conversational exploration** — dig deeper by asking questions in natural language and receiving accurate answers grounded in Tableau Semantics
- ☒ **Action at the point of insight** — share findings, escalate cases, or advance stalled deals without switching tabs
- ☒ **Collaborative intelligence** — keep the whole team aligned on a trusted, single source of truth for business metrics

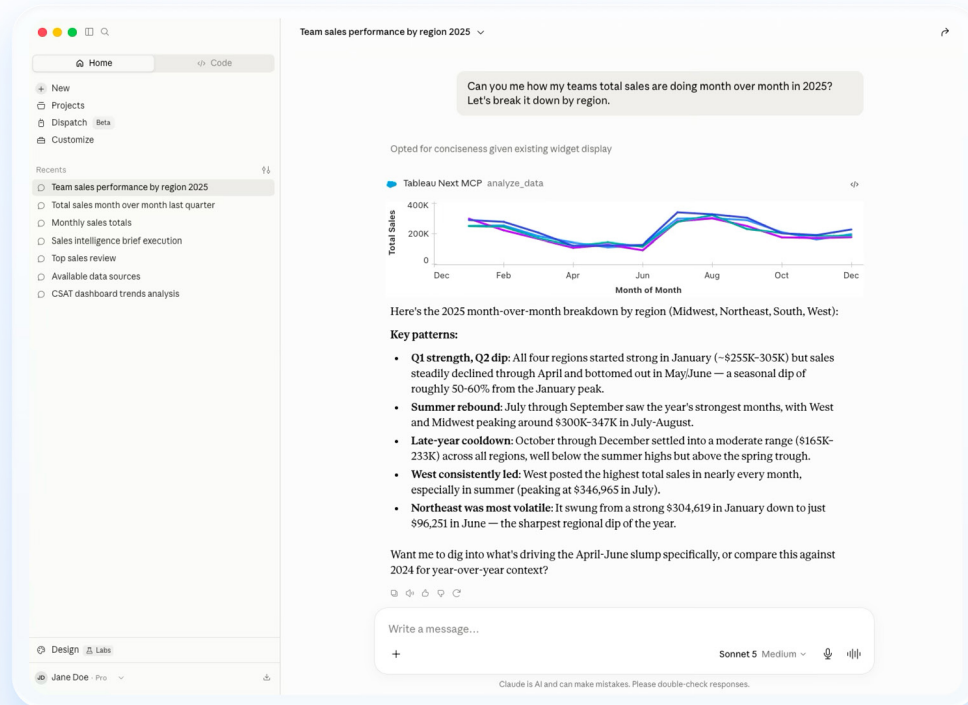
A sales manager asks Slackbot, "How is my team tracking against quota this quarter?" Because Slackbot is connected to trusted knowledge from Tableau Next via MCP, it returns accurate insights and rich visualizations of rep-level attainment alongside a natural language summary — no tab-switching required.

Bring accurate analytics to any AI agent

Connect your AI ecosystem to trusted analytics with Tableau Next Model Context Protocol and Tableau's headless architecture

Tableau's headless architecture allows you to embed trusted knowledge into any surface, eliminating context switching and improving productivity. MCP (Model Context Protocol) is the open standard for securely connecting AI agents to external tools and data.

With Tableau Next MCP, you can connect Tableau Next's governed data, semantic models, and Tableau Agent to any MCP-compliant AI client: Slackbot, Claude, Cursor, ChatGPT, and more. This means any AI agent can securely access trusted and governed analytics from Tableau Next, bringing accurate, relevant insights directly into the flow of work wherever AI assistants are used.



A marketing analyst working in Claude asks, "What are the top-performing campaigns by pipeline influenced this quarter?" Claude connects to Tableau Next, searches your semantic models and dashboards to find the right data, and returns a clear, accurate answer in natural language, paired with a visualization.

With Tableau Next MCP, analytics are no longer locked inside a BI tool. Instead, they're available across every AI agent your teams already use.

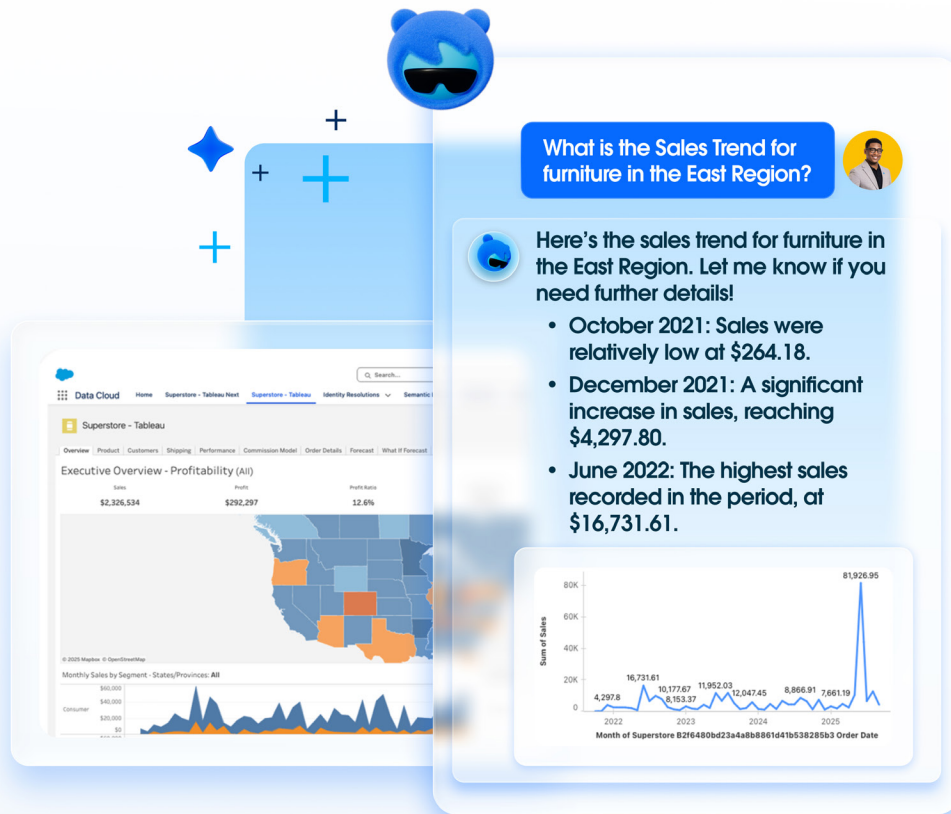
Connect with a vibrant community of innovators

Businesses are never alone on their analytics journeys. With more than five million members, the Tableau Community — known as the DataFam — is the largest and most passionate data and analytics community in the world. This global community shares ideas, best practices, and support across forums, events, user groups, and a [dedicated Slack workspace](#).



Tableau Next uniquely connects two of the world's most powerful communities — Tableau's DataFam and Salesforce's Trailblazers — to co-create and solve real business problems. Whether a user is learning about semantic models, Agentforce, or how to create the best visualizations, the broader community can help accelerate that learning through forums, global user groups, community resources, and on Tableau Public, where members can explore and reverse-engineer dashboards.

Become an Agentic Enterprise: Your Next Steps



As showcased in this guide, Tableau Next empowers organizations to unlock the true potential of agentic analytics through a deeply unified platform integrating a trusted semantic layer, pre-built agentic analytics skills, and seamless action. However, even the most innovative technology is only effective when underpinned by a well-defined strategy.

Develop data and AI strategy for the agentic era

Turning data into a genuine competitive advantage as an agentic enterprise requires more than just cutting-edge tools; it demands the right foundation to drive adoption, automation, and long-term impact. Businesses need a strategic framework and proven path.

That's why we created the [Tableau Blueprint for the agentic era](#). Developed as a companion guide to navigating the broader landscape of data and AI transformation, it facilitates a clear vision of the future, backed by practical plans, so businesses can turn it into reality. Without this strategic lens, even the most promising agentic analytics initiatives can dissolve into disconnected efforts and unrealized potential.

Gain a competitive edge with a trusted, unified platform

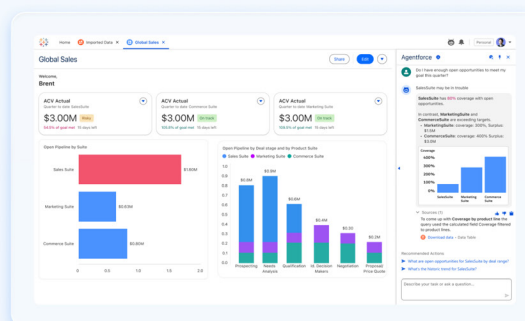
With Tableau Next and the Headless 360 platform advantage, businesses are truly engaging with their analytics. No longer just garnering insights — they're activating data, scaling innovation, and unlocking efficiencies in ways never before possible.

Tableau Next's unique architecture enables organizations to leverage the trusted benefits of Salesforce's unified code base, and to access the breadth of agentic AI capabilities with speed and ease. This deeply unified platform empowers every agentic enterprise with a competitive edge through personalized, actionable, AI-driven analytics.

Learn more about Tableau Next to get started with agentic analytics today.

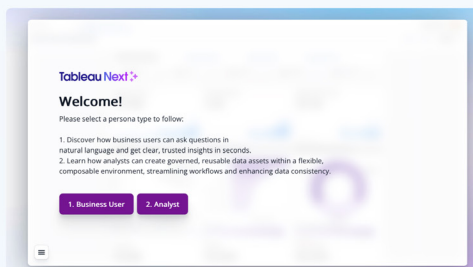
See Tableau Next in action.

Watch demos



Experience Tableau Next as a business user and as an analyst.

Guided tour





About Tableau from Salesforce

Tableau is more than just a business intelligence tool – it's an AI-powered platform that turns data into action. With a suite of agentic analytics and generative AI capabilities, Tableau helps everyone, in every industry, get the insights they need, proactively and without effort.

Built on a connected and adaptable platform, Tableau gives you the freedom to choose your architecture and scale as your AI strategy evolves. With enterprise-grade security, governance, and compliance built in, you can move with agility while keeping your data trusted and secure. Backed by the industry's largest partner ecosystem and a passionate global community, Tableau helps you unlock limitless possibilities with your data.

For more information, visit www.tableau.com.

