Tableau on Tableau: Leading Through Change

How Tableau is using our products to support our business, our customers, and the public during these challenging times.
We help people see and understand data
Customers are making critical decisions with data now
Tableau Sales Analytics

CAM CALDWELL | CUSTOMER SOLUTIONS
Sales Pipeline Dashboard
Track Sales Pipeline Under Normal Conditions

Under normal conditions, Tableau’s Sales Team uses a dashboard like this one to understand the status of its sales pipeline.

This dashboard shows how much opportunity is in the pipeline, how deals are progressing, and when business is expected to close.

One of the helpful features of this dashboard is that it’s completely interactive, so that we can drill in and see the pipeline within specific segments of our business. We can also explore the underlying data to ask questions not answered here.
Sales Pipeline Analysis
Understand Pipeline Risk Due to the Covid-19 Epidemic

Tableau’s sales team needed to understand what deals in its pipeline were at risk because of the epidemic.

Leaders asked account teams to put the name “Covid” in Salesforce Opportunity Names that were at risk.

Analysts were then able to report on the potential business impact of the crisis and understand what deals and segments are facing challenges.

Executives can now focus response efforts on the parts of the business that need help.
Tableau Finance

MIKE CROOK | FINANCE ANALYTICS
Finance Analytics Resources

Tableau for Finance

Vizzes 44  Followers 906

Use Cases

Accounting
FP&A
Internal Audit
Treasury
Accounts Receivable
Procurement
Accounts Payable
Tax

tableau.com/solutions/finance-analytics
Variance Analysis
Understand Up-To-Date Financial Results Vs. Expectations

Given the rapid changes in our economy and business operations, it can be harder than ever to manage budgets, expenses and forecasts.

The finance team’s dashboards provide up-to-date results and enable the team to change forecasts as uncertainty decreases.

By sharing this dashboard with leaders across the business, the finance team supports strategic decision-making and resource allocation.
Tableau People Analytics

JON AGNONE | HUMAN RESOURCES
Employee Safety Dashboard
COVID-19 Case Data Visualized Relative to Employee Locations

In this time of uncertainty, Human Resources prioritizes making sure its employees are safe. Tableau’s executives were interested in monitoring local conditions and proactively guiding employees to work from home in epidemic hotspots.

We used the power of Tableau Prep Builder to join Workday data file with COVID data from Johns Hopkins.

This dashboard provides daily updates that will help inform executives around when it’s safe to return to work.
Employee Experience Survey
Understand How to Support Employees Working from Home

Like many businesses, Tableau and Salesforce employees have been working from home.

A survey of our employees -- administered in the Salesforce Survey Platform -- shown in this dashboard help us understand the challenges of these work conditions and learn how we can better support our employees.

Thanks to our Salesforce colleagues, we’ve made the survey behind this dashboard available for you to download and use for yourself.
In response to the Covid epidemic, marketing teams have been putting more budget into digital campaigns and launching new digital initiatives.

This dashboard tracks a new marketing effort at Tableau and provides critical KPIs about its performance.

The dashboard is posted to our internal Tableau Server, where executives can subscribe via email, comment or dive into the data source themselves.
Content Engagement Dashboard
Improve Customer Experiences With Web Analytics

With any website, it’s important to improve content and optimize user experiences. Even more so when launching something entirely new.

This dashboard shows where site traffic is coming from, how visitors are engaging, and what next steps users are taking. It’s optimized to spot trends: Arrows indicate how the link has been performing relative to prior periods and prompt exploration.

With this information, users can decide what content to feature, optimize and promote when updating the page.
Supporting Our Customers
AB COMMENDATORE | CUSTOMER SOLUTIONS
I'm working on getting a Tableau Doctor from the creative team.
Customer Request Management
Understand and Manage Incoming Customer Requests

Tableau’s customers are asking question of their data they never anticipated asking—like how to share data with the public. Some are looking for a little help. Our Tableau Conference volunteer program of “Tableau Doctors” jumped in to support organizations as they responded to their challenges.

Our customer success teams use this dashboard to manage requests. It shows the request status, people tied to the request, and relevant contact information. It’s also easy for business owners to see all the request tied to a specific segment or account.
Volunteer Staffing Management
Identify Staff Who Can Support Specific Customer Requests

When employees heard they could help customers with needs tied to the pandemic, volunteers joined a slack channel to see what they could do.

This dashboard shows the slack channel's membership enriched with details about each member's background. The background data is pulled from Workday and other spreadsheets.

Now, if a customer in Japan needs help with HR data, it's easy for program managers to find someone with specific qualifications to respond to their needs.
With any new program, it's important to track who is contributing resources and how their efforts are having an impact.

This dashboard shows the amount of time our customer support teams spent working on requests by account and by employee. Hovering reveals details about the request and the nature of the work in the tooltips.

Understanding how employees are spending their time helps managers on the customer success team manage their resources more effectively.
Helping the Public

JEREMY BLANEY | CUSTOMER SUCCESS
Create Reliable Data Sources
Clean and Prepare Up-to-Date Data For Anyone to Use

In response to the Covid-19 epidemic, many institutions have shared valuable data that can be used to enrich business information. While helpful, those data sources often need cleaning and re-shaping to be made useful.

Tableau’s teams use Tableau Prep flows like this one to put clean, reliable data sources on our Covid-19 Data Hub. Once the prep work has been performed once, it can be repeated with just a few clicks every day. Our hope is that this data is helpful to anyone looking to understand this ongoing epidemic.
Organizations in the public sector, non-profit, media and beyond all share Tableau dashboards about the Covid-19 epidemic’s impact on society.

Tableau Public’s free analysis and online hosting offers a reliable way to publish these dashboards and embed them on your web site.

Dashboards offer online audiences the ability to interact with data and make decisions based on information they trust.
Jumpstart your analysis

Access trusted data that you can adapt to meet the needs of your organization

**Healthcare**
- University of Chicago Medicine Tableau Workbook
- Slalom CoSafe Tableau Starter Kit
- Prominence Healthcare Tableau Workbook
- Tableau Covid-19 Starter Workbook with JSU embedded data

**Government**
- Tableau Covid-19 Starter Workbook with JSU embedded data
- Read how Governments are using Tableau

**Financial Services**
- COVID-19 Analysis for Financial Services Webinar
- Bank and Employee Risk with COVID-19 Workbook
Covid-19 Data Hub
Access, analyze and stay informed.

- **Keep track** of the pandemic with daily global tracker.

- **See and understand the impact** of the virus—and learn from examples of how to analyze the data—with a curated viz gallery from Tableau community.

- **Jumpstart your own analysis** with starter kits with trusted data that you can apply to your needs.

- **Learn how to work with Covid-19 data responsibly** with trainings and how-to guides.
Upskill your organization

Tableau eLearning
As the global economy recovers, data skills will be in high demand. Tableau is offering free eLearning for 90 days so anyone can learn new skills while working from home.

Tableau Certification
Tableau Certification is an excellent way for anyone to prove their data skills. Tableau is offering the on-demand, web-based training course and exam at 50% off through June 30.

Improve data skills to help your organization respond faster
Resources from today’s webinar

All of the dashboards shared today are accessible for you to explore on Tableau Public.

Or, download from them from the webinar’s resources pain and open them in Tableau Desktop.