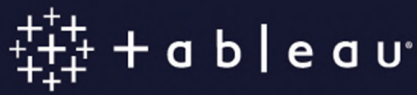
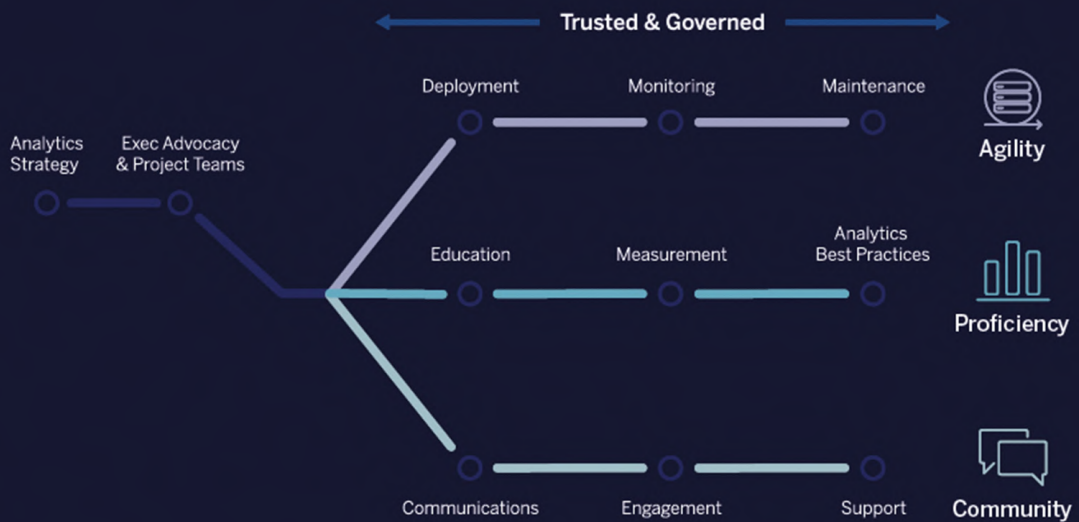


# A PRACTITIONER'S GUIDE TO



# BLUEPRINT



# **A PRACTITIONER'S GUIDE TO TABLEAU BLUEPRINT**

## **A Practitioner's Guide to Tableau Blueprint**

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# About USEReady

USEReady's mission is to help users succeed with data.

We achieve this mission with fanatical customer centricity, humility, and integrity. At USEReady, we love to solve customer problems, contribute to community, and continue to improve. We aim to build a strong learning culture and have fun doing it together.

We have harnessed modern Business Intelligence solutions with cutting edge Artificial Intelligence (AI) platforms to unlock the power of data. Our result-oriented solutions ensure that our customers are successful in adopting self-service technologies.

We have partnered with the best in class BI, Data and Cloud products such as Tableau, Snowflake, Alteryx, Informatica, Exasol, AWS and Azure. We have delivered proven success across Financial Services, Insurance, Retail and Media verticals.

Check us out at [www.useready.com](http://www.useready.com) or e-mail [contact@useready.com](mailto:contact@useready.com).

## About Tableau, Inc.

Tableau Software, headquartered in Seattle, Washington, is a leader in data visualization and data analytics solutions. It was founded in 2003 to create software products focused on Business Intelligence with a revolutionary approach.

The company was recognized as the leader of the Gartner Quadrant for five consecutive years from 2012 to 2017 due to its remarkable Ability to Execute and Completeness of Vision.

Hundreds of thousands of data analysts around the world rely on Tableau Software products for their daily data preparation, data visualization, and data exploration needs. Tableau is also recognized as one of the top products in delivering powerful end-user interactivity supported by self-service capabilities.

In simple terms, Tableau Software helps people see and understand data. For more details, please visit [www.tableau.com](http://www.tableau.com)

# Foreword



Michael Holcomb, Senior Strategic Customer Success Manager at Tableau, helps Tableau's largest customers in the financial services industry achieve self-service analytics at scale. Michael has been working in the financial services industry for 20 years and has used Tableau since 2008. He has implemented Tableau's enterprise platform for internal and external-facing deployments, helping teams and customers see and understand their data.

A few words from Michael:

At Tableau, our mission is to “help people see and understand their data” – seven words that drive everything we do. Our products are transforming the way people use data to solve problems. We make analyzing data fast and easy, beautiful and useful. It's software for anyone and everyone.

Transforming how your company makes decisions every day is no easy task but incorporating data and analytics into decision-making cycles is how you will see the most transformative impact on your organization.

Achieving that level of transformation requires a deliberate and holistic approach to developing your analytics practice. Tableau Blueprint is a step-by-step guide to becoming a data-driven organization.

Education is a critical element of Tableau Blueprint. To integrate modern analytics into the fabric of your company, it's essential to build a scalable and ongoing learning plan

for all your users. A skill belt program provides a pathway for a user to develop skills and establish a common language across an organization for abilities at measured levels of knowledge and competency.

Such a program should be designed to sequentially build skills and knowledge across product functionality, storytelling, design, visualization, best practices, and community resources. That will enable you to quickly scale both horizontally and vertically to ensure that you are maximizing your investment in Tableau by creating deep pools of highly skilled users throughout your organization. You should strive to connect users within your company and generate enthusiasm among a group of people founded on the common cause of putting data at the center of every conversation.

USEReady is a leader in educating users in analytics best practices, empowering users with the Monitor, Analyze, and Detail (MAD) methodology for dashboard design, and the Long Pole in the Tent (LPiT) philosophy for optimization.

It doesn't matter if your organization is new to modern, self-service analytics or if you've already deployed and need to broaden, deepen, and scale the use of data. USEReady can help develop guidelines, standards, and processes for the discovery, interpretation, and presentation of data.



# Foreword



Since joining Tableau in 2010 and through the early days of Tableau Desktop to today's Tableau Platform, I have collaborated with USEReady extensively to help our customers "see and understand data." In my current role as a Senior Strategic Customer Success Manager, I focus on helping customers develop and grow a

data-driven culture. USEReady has leveraged its vast expertise in its latest book, *A Practitioner's Guide to Tableau Blueprint*. Just like USEReady's previous guides, this book is sure to become a premier resource to help customers create that data-driven culture.

Today, 92% of companies are failing to achieve analytics at scale (McKinsey Analytics Survey). Tableau Blueprint is a guide to help achieve this elusive goal by building the necessary capabilities. There are three core capabilities at the heart of Tableau Blueprint: Agility, Proficiency, and Community, all built on trusted and governed data. In this guide, USEReady helps you build those capabilities through concrete plans, recommendations, and guidelines, helping you become part of the 8% achieving analytics at scale.

As a seasoned Tableau professional whose primary goal is empowering companies to become self-service, data-driven organizations, I'm very excited to add this guide to my toolkit.

Jeremy Walsh  
Senior Strategic Customer Success Manager  
Tableau Software

## Table of Contents

<b>ABOUT USEREADY.....</b>	<b>4</b>
<b>ABOUT TABLEAU, INC. ....</b>	<b>5</b>
<b>FOREWORD .....</b>	<b>6</b>
<b>FOREWORD .....</b>	<b>8</b>
<b>CHAPTER 1.....</b>	<b>11</b>
<b>BLUEPRINT OVERVIEW.....</b>	<b>11</b>
1. Tableau Blueprint Overview .....	12
2. Bringing It Alive - USEReady Community Center as a Perfect Companion to Tableau Blueprint Strategy .....	15
3. User Roles.....	17
3.1. Tableau Blueprint Advocacy and Project Teams .....	17
3.2. Community Center Roles .....	18
4. Tools.....	19
<b>CHAPTER 2.....</b>	<b>21</b>
<b>CREATING AN AGILE ENVIRONMENT.....</b>	<b>21</b>
1. MAD - Monitor, Analyze and Detail.....	23
1.1. M in MAD: Monitor .....	25
1.2. A in MAD: Analyze .....	26
1.3. D in MAD: Detail .....	27
1.4. Implementing MAD.....	28

2.	Long Pole in the Tent - Optimizing Workbooks .....	29
2.1.	Desktop Optimization .....	30
2.2.	Server Optimization .....	35
<b>CHAPTER 3.....</b>	<b>37</b>	
<b>DEVELOPING ANALYTICS PROFICIENCY.....</b>	<b>37</b>	
1.	Education.....	39
2.	Measurement.....	44
3.	Analytics Best Practices.....	51
<b>CHAPTER 4.....</b>	<b>55</b>	
<b>DEVELOPING AN ACTIVE COMMUNITY .....</b>	<b>55</b>	
1.	Communication .....	57
1.1	Discussion Forum .....	58
1.2.	Communications Library .....	59
2.	Community Engagement.....	60
2.1	User Groups .....	61
2.2	Events and Webinars.....	64
3.	Help and Support .....	65
<b>REFERENCES .....</b>	<b>68</b>	

# CHAPTER 1

## BLUEPRINT OVERVIEW

## 1. Tableau Blueprint Overview

To achieve and maintain success, the modern enterprise relies on data and analytics to make more strategic and faster decisions. The magnitude of data that organizations capture, store, and organize grows exponentially year over year. Organizations large and small that recognize the importance of effective data analytics have a tactical advantage over those that are slow to adopt.

In addition to ensuring that your Tableau server is deployed on a scalable platform and training provided to users, a mind-shift around how the organization recognizes data needs to occur. Adopting a data-driven culture requires defining and continually developing governance around data validation and security.

The change processes defined will enable a larger community of users to have timely access to the right information with as few obstacles as possible. From executive leadership to Creators and Viewers, participation and a commitment to modify behavior is needed to sustain long-term change. Effective communication across all levels of the organization will help to align objectives and ensure that issues are raised before significant impact.

To execute a complete Analytics Strategy, refer to Tableau's comprehensive Blueprint Help Guide, which can be found at [help.tableau.com/current/offline/en-us/tableau\\_blueprint.pdf](https://help.tableau.com/current/offline/en-us/tableau_blueprint.pdf)

Additional information can be found at [www.tableau.com/learn/data-culture](https://www.tableau.com/learn/data-culture)

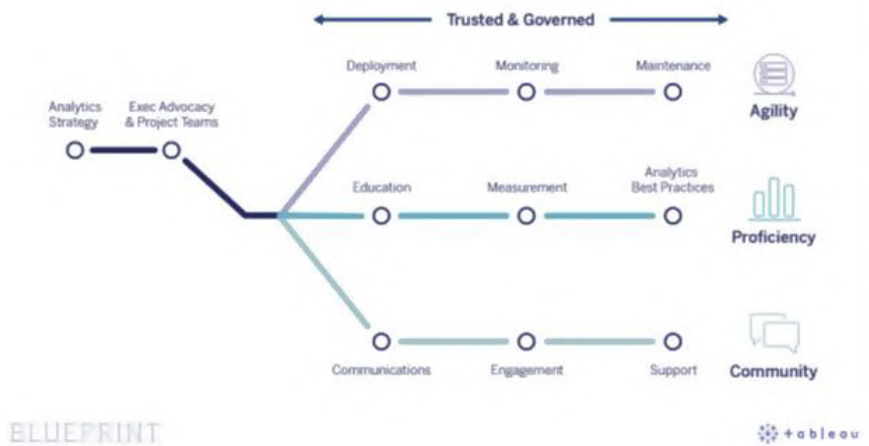


Figure 1. Tableau's Blueprint (Tableau Blueprint Help, 2019)

### *Data Is Your Most Valuable Asset*

Forbes Technology Counsel published an article (Why Digital Transformations Fail: Closing the \$900 Billion Hole in Enterprise Strategy, 2018) outlining the gaps that exist in most organizations and prevent a successful digital transformation. The article identified teamwork, a system of record for work, the modern assembly line, work collaboration, and consolidated sources of truth as critical for success.

This practitioner's guide highlights the critical success factors detailed within the Tableau Blueprint and how they can be executed within a community center.

In a study by International Data Corporation (IDC) (The Digital Universe of Opportunities: Rich Data and the Increasing Value of the Internet of Things, April 2014), IDC found that 42% of managers said they have less than 24 hours to make an important business decision, and, in many cases, they don't have access to data to help inform those decisions. Additionally, at least 64% of managers have seen the time allowed for decision-making shrink in the past 12 months. Data-driven enterprises are faster with their decisions,

allowing them to better respond to dynamic business environments and competitive markets.

### *Creating a Data Culture*

A data-driven organization that fully embraces the concept of readily available and accurate analytic insights achieves this by supporting three primary organizational capabilities within Tableau: agility, proficiency, and community. To execute successfully an organization needs to establish a holistic analytics strategy, including a well-defined and evangelized governance and change management process.

Establishing and maintaining both data and analytics governance is key to advancing a data culture within your organization. Whether the goal is to fully advance self-service capabilities within Tableau or simple to better align existing groups that develop analytics, the organization will benefit from governance.

Irrespective of the size of your organization, you can likely recall times when different groups attempting to report on the same KPI or metrics, produced varying results and likely after spending significant effort to produce those results. As we will cover in greater detail, communication and governance complement one another, as it is not good enough to have a good process if only a segment of your community is leveraging. Optimally and where appropriate, governed data sources and vetted analytics will be shared and enhanced. This will not only lead to consistency in reporting but will also cut down on wasted work effort.

Efforts also need to be made to measure the success of efforts, as well as impacts. For larger and geographically disperse organizations, leveraging existing or new technologies, such as a community center are an efficient way to coordinate these activities, particularly those activities that align to measuring changes to cultural behavior. Additionally, as part of an organization's analytics strategy, a plan should be developed

for regularly assessing impact areas related to the agility of the Tableau server environment, performance metrics of individual workbooks and tangible impacts to the business.

### *Governance – Data and Content*

Tableau identifies two key areas of governance – data and content – to be evaluated and evolved in order to provide a modern self-serve analytics experience to business users. Data governance ensures the accuracy of data available in order for users to make decisions. For additional details on data governance, refer to the Tableau Blueprint Help Guide (Tableau, 2019).

A community center helps organizations execute on best practices related to governance, easily transforming theory into practice.



Figure 2. Governance (Tableau Blueprint Help, 2019)

## **2. Bringing It Alive – USEReady Community Center as a Perfect Companion to Tableau Blueprint Strategy**

Tableau's Blueprint is a detailed framework designed to assist IT and business groups to develop a high-performing data culture, enabling trusted and governed self-serve analysts and expedited business insights. Within this practitioner's guide designed to supplement the information found in the Tableau Blueprint Help Guide (Tableau, 2019), we'll be sharing step-by-step guidance related to both IT and business



functions but with a focus on how our Community Center can help advance proficiency and enable community in your organization.

From years of experience helping customers implement Tableau, we notice that quite often IT and business teams are not able to achieve their analytics objectives. A consistent reason for this challenge is a lack of centralized proficiency and a community platform.

Conversely, organizations with traditional Learning Management Systems (LMS) have a central location to refer to, but content is often stale and not structured with a guided path. To assist both public and private groups with a prescriptive and dynamic enablement experience, USEReady offers the Analytics Community Center.

Successful Business Intelligence (BI) Leaders identify keys to success as creating a community to engage with users and building data literacy with all teams. Designed to support Tableau creators, explorers, and viewers, the Community Center assists BI Leaders develop and evolve a culture of analytics and get more value from their existing data.

The Community Center, developed and hosted by USEReady, comes pre-populated with an abundance of valuable content curated from various sources in the Tableau community, enabling organizations to quickly ramp up their analytics journey. Customizations, while not required, may be desired in order to align to current tools and offerings within your organization. Help is available for those customizations, and common options will be discussed throughout this guide.

After reviewing the information in this guide and getting assistance from USEReady to complete an assessment, your organization could have access to the Community Center such as the one below, transforming how you enable your users.

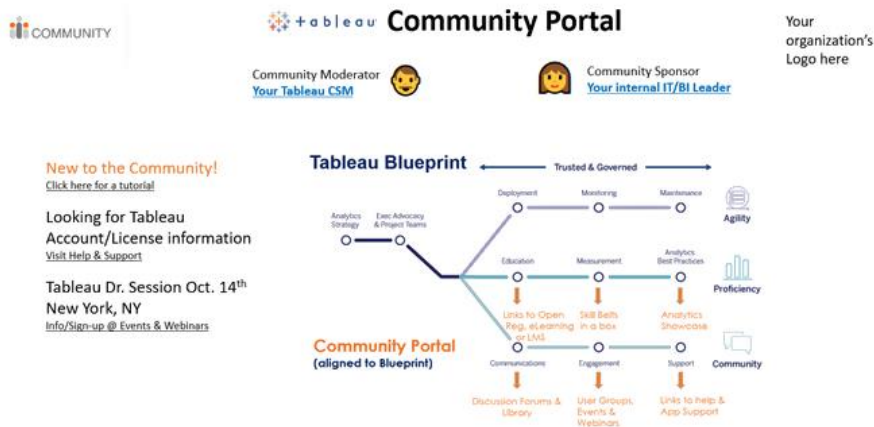


Figure 3. USEReady Community Center

### 3. User Roles

#### 3.1. Tableau Blueprint Advocacy and Project Teams

To ensure lasting success, transformational initiatives require executive sponsorship, as well as a comprehensive project team to execute the strategy for a trusted and governed Tableau analytics practice. Within the project teams, Tableau defines several Blueprint roles: Analytics Director or IT Service, Enterprise Architect, Security and Compliance Administrator, Database Administrator, Systems Administrator, Network Administrator, Client Administrator, Project Manager, Data Stewards, Content Authors, Content Consumers, and Community Leader. For complete descriptions and associated responsibilities of these roles, refer to Tableau’s Blueprint Help Guide (Tableau, 2019).

Now let’s explore in more detail three of Tableau’s defined roles: Content Author, Consumer, and Community Leader.

- a. **Content Author:** Creates and publishes dashboards and possibly the underlying data sources. The role is fulfilled using a Tableau Creator license.

- b. Content Consumer: Uses Tableau to make data-driven decisions; could be a Creator, an Explorer, or a Viewer.
- c. Community Leader: Responsible for user enablement and building a community. There could be several individuals in an organization who fill this role, and they frequently have a second role such as Customer Success Manager (CSM), Sales Executive (SE), or Sales Consultant (SC).

### 3.2. Community Center Roles

Whether in real life or virtual communities, consistent participation and a value-added experience are clearly defined roles and have associated responsibilities. Those in leadership roles should not only be technically competent but also committed to fostering an inclusive environment, recognizing the benefits of virtual learning, sharing, and teamwork. Below are the key roles for the Community Center.

- a. Blueprint Coach or Moderator: This individual oversees the Community Center and partners closely with the Community Leader, fostering the data-driven culture through the portal. A Moderator is someone who is proficient with best practices related to high-performing analytics communities.

For many enterprises, the Tableau CSM fills this role best since it corresponds with many of the activities he or she is already performing. Organizations with a mature Center of Excellence may want to nominate someone internal as a Moderator. Public user groups could also nominate a Moderator from within. For organizations without access to a Tableau CSM and without the internal expertise to nominate a Moderator, a viable alternative is a Blueprint Coach who is skilled in all aspects of Tableau Blueprint and can mature the analytics culture in your organizations, as well as fill the Moderator's role. That individual

would be a billable consultant, tasked with the objective of eventually handing over the Moderator role to someone internal.

- b. **Participants:** Comprised of Content Creators and Content Consumers, these individuals may be working in isolation or in small groups and will now have access to a broader community of expertise. They will benefit from having a primary location to visit in order to improve their skills, measure their achievements, reference best-in-class sample high-performance analytic dashboards or reports, and network with others.

#### **4. Tools**

Similar to Tableau's mission to "help people see and understand their data" and with a core belief that communities and continual learning inspire positive change in both individuals and organizations, USEReady has created the Community Center and Skill Belt. They are both cloud solutions built and hosted by USEReady. Below are additional details:

- a. **Community Center:** A central location for an enterprise or group to access analytics content and share information consistent with the Tableau Blueprint. The Community Moderator will have access to configure many aspects of the community experience and will be the go-to person for posting information and tracking achievement. Similar to the overall analytics strategy for your organization, the Moderator is key to ensuring that best practices are implemented, relevant stakeholders are informed, and usage is continually measured.
- b. **Skill Belt:** This is a collection of best practices and learning content packaged with knowledge assessments, rewarding participants with merits and

identification of leaders within the organization, all accessed in the Community Center.

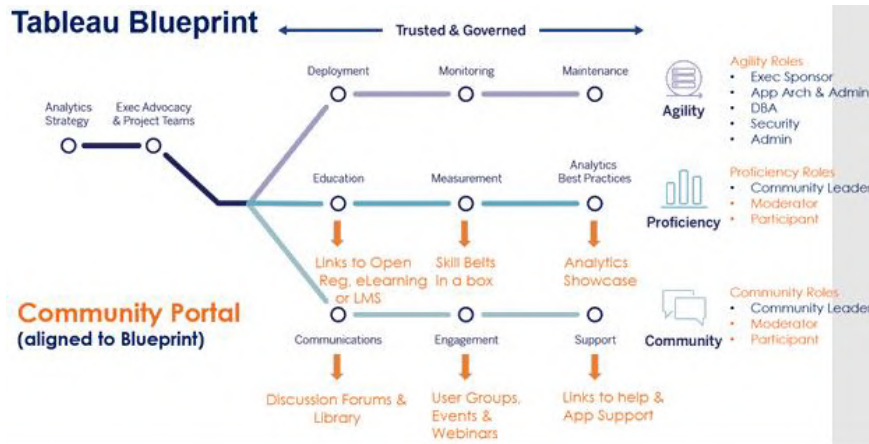


Figure 4. Tableau’s Blueprint in the USEReady Community Center



WE HELP USERS SUCCEED WITH DATA.

## ABOUT THE BOOK

Following the best practices defined within Tableau Blueprint and leveraging a technology solution such as USEReady's Community Portal and Skill Belt, this guide will assist Information Technology and Business leaders in developing a high performing team of users and a robust culture of analytics throughout their organizations.



### JEREMY WALSH

Senior Strategic Customer Success Manager | Tableau

Tableau Blueprint outlines the processes and best practices to develop a culture of self-service analytics and fully realize the value of your data. Following this practitioner's guide and leveraging USEReady's Community Portal can expedite the journey to developing proficiency and building a strong community of users across your enterprise.



### MICHAEL HOLCOMB

Senior Strategic Customer Success Manager | Tableau

Tableau Blueprint is a step-by-step guide to building the capabilities you need to create a successful Data Culture in your organization. In this practitioner's guide, you'll find helpful information to inspire, support learning, and drive excitement around data.



Author

### JEFF EL-KOURY

Senior Program Manager | USEReady

Jeff has been helping Tableau customers see and understand their data for over four years. Throughout his career, Jeff has been able to work with 100s of organizations, helping both IT and business groups advance their culture of analytics.



Author

### ANIRBAN GHOSH

Product Manager | USEReady

Anirban Ghosh is a Product Manager in USEReady's Engineering Practice. He plays a strategic role within the practice and leads the ideation, development, go-to-market strategy and launch of innovative products.

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