Tableau Blueprint
Hammer and Nail Edition

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Solutions Director
*Tableau*

#data19
Agenda

1. 7-minute blueprint overview
   The high level view

2. Applying blueprint in your context
   Why context matters

3. Blueprint realities and strategies
   Look at real situations and offer some ways to work with blueprint in sub-optimal conditions

4. Wrap up/additional support
Shh…

A little secret about Tableau Blueprint…
Blueprint in 7 Minutes
What’s It (Really) All About?

To find new opportunities
Applying Blueprint in Your Context
Basic Principles of Design

- Unity
- Balance
- Color
- Transition
- Line
- Proportion
- Repetition
Basic Principles of Design
Basic Tenants of Blueprint

- Analytics strategy
- Project teams
- Agility
- Proficiency
- Community
- Governance
The Company—Mega Industries

Executive team
Fully committed to analytics-based strategy.

Line managers
Comfortable with analytics

The board
Approved a large capital expenditure budget that focuses on investments in analytics

HR
Trains employees in using data, hires with analytical capabilities in mind

Data
Completed major data consolidation project into a cloud-based data warehouse
Executive team
Likes analytics because it provides: “get some cool new dashboards with pie charts, lots of maps and dials and stuff… also lots of color”

Line managers
Can spell analytics (mostly)

The board
Trying to squeeze the IT budget to increase profitability. New hardware requires 6-9 months to approve and implement

HR
Is not aware of the importance of data and analytics
The (Other) Company—Mini Industries

Data
Most of the company's key data is in a 30-year-old COBOL-based system that is supported by the last two remaining members of the project team that implemented the system in 1984. Data is available via daily batch requests for pipe-delimited text files.

Well… you get the idea
Blueprint Realities
Let’s Build!!!

In each section I will lay out:

• Blueprint
• Context/Reality
• Plan
Deployment

Blueprint
“Regardless of where you choose to deploy Tableau Server, properly-sized hardware is critical. Your planning should be aligned with evolving business needs by assessing server utilization and user engagement more frequently, **scaling more frequently**, and changing topology more frequently than other software applications.”

Hammer and nails context
“We will expand our capital budget in 2020, until then there is no additional hardware available for Tableau…”
Deployment

Time to get creative
Deployment

Application plan

The key to success in a severely restricted infrastructure is ruthless efficiency. How to do more with less. For example:

1. Tune your server and data sources for your specific usage profile
2. Consider memory upgrades
3. Police your users and content
4. Offload anything that can be done elsewhere (Data Sources, Tableau Desktop)

“Discard everything that does not spark joy.”

MARIE KONDO
Blueprint

“Think not just as an analyst but also as a designer and consumer. Dashboards should have interactive elements that are discoverable and predictable, follow a sensible, logical layout, and have a simplified design that makes complex decisions easier.”

Hammer and nails context

“I want it to look like this…”
Analytics Best Practice

Converting to a visual analysis paradigm is a process for people…especially those that have used an existing view of analytics for a long time (e.g., Excel)
## Analytics Best Practice

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Add screen shots… show an A/B design of a Superstore dashboard.
Analytics Best Practice (Data)

Blueprint
“In a self-service environment, the role of data governance is to permit access to data to enable users to get the answers they need while ensuring security is enforced”

Hammer and nails context
“There is no data warehouse, data is everywhere, and we are not sure what is reliable”
Analytics Best Practice (Data)
Analytics Best Practice (Data)

There is nothing here yet.
Analytics Best Practice (Data)

Application plan
1. If you have data everywhere (usually in spreadsheets) implementing Tableau is the start of making things better
2. Aim to add new published data sources on a regular schedule, just like you add new dashboards
3. Try to get the fields/schema right, even if the source will change later
4. Setup appropriate security and governance in Tableau Server, even if the source will change later
5. Chart your data on a scatter plot, identify high value, low effort data sources and prioritize them
Analytics Best Practice (Data)
Measurement

Blueprint
“As Tableau is deployed broadly across your organization to users of all skill levels, administrators need to ensure that the content that is being created and consumed is discoverable, fresh, and relevant to your audiences. To accomplish this, administrators should measure the user engagement and adoption.”

Hammer and nails context
“I don’t have the ability to measure everything and keep up with it all. I have over 2000 users.”
Measurement

REGIS PHILBIN

I'M ONLY ONE MAN!
Measurement
Measurement

Application plan

1. Review usage key KPIs that can drive insight. For example:
   • Date since last login. Consider creating daily, weekly, and monthly bins
   • Most frequently reviewed content (why?)
   • Review your power users. What are they doing differently?

2. Publish Postgres-based data sources for your teams...one of the best things you can do for them since you can’t stay on top of everything. Have others who may be closer to the content help you.

Analytics Strategy

Blueprint
“The executive sponsors set the vision for modern analytics, align projects to transformational initiatives, nominate staff for project and advocacy roles, and ensure accountability. They will serve as the governing body for the use of Tableau.”

Hammer and nails context
“When it really comes down to it, the execs are not focused on the details; they just want us to be a data driven organization by the first of the year”
Analytics Strategy

What do we need to discuss?
Analytics Strategy

Application plan

1. Embrace your role as a culture change agent

2. Identify where you need support. What are the non-negotiables? Budget? Training? Timeframes?

3. Communicate up more than you think you need to. You are selling and reporting progress
Changing Culture (from Blueprint)…

“It requires new skillsets, new processes, and changes in behavior from all users within your organization. Enterprise deployment requires effort and coordination across multiple stakeholders and users with different and sometimes opposing viewpoints and interests; however, each one will provide their own valuable perspective. Orchestrating this change, and doing it efficiently, requires buy-in, alignment, and participation from a broad set of cross-functional stakeholders.”
“Without monitoring, a “set-it-and-forget-it” deployment can be met with inadequate resources that fail to support the workload of highly-engaged users.”

Hammer and nails context
“So many things to monitor… so little time.”
Monitoring

Application plan

Basic monitoring can only do so much. Too many variables are changing. Prioritization is critical. Which factors require action? Here are some possibilities:

1. Stale content
2. Backgrounder status/failures
3. CPU/Memory utilization
4. Dashboard response time! (good because it sums up a lot)
5. Ratio of minutes updating via backgrounder to access frequency (large is bad)
Governance

Blueprint

“Governance is central to Tableau Blueprint because it is governance that makes self-service possible. As the anchor point, governance will drive all decisions as the project team develops agility, proficiency, and community across the organization.”

Hammer and nails context

“People love Tableau because it’s self-service and easy to use… if I restrict it no one will use it”

OR

“If I don’t put restrictive governance processes around my Tableau environment, it will be chaos”
Governance models

Centralized

Delegated

Self-governing
Governance
Governance

Centralized governance  
“Autobahn”

Certified project:  
Dashboards certified for each area

Certified data sources:  
Data sources certified for each area

Self-governing governance  
“Jeep Road”

MARKETING PROJECTS

Explorer (self-service/data discovery) project:  
Explorer built dashboards built using certified data sources for each area

Collaboration/Sandbox:  
Custom dashboards/data sources (ad-hoc/one off/adoption pilot) for each area
Governance

**Marketing projects**

- **Certified project:**
  Dashboards certified for each area

- **Certified data sources:**
  Data sources certified for each area

**Explorer (self-service/data discovery) project:**
Explorer built dashboards built using certified data sources for each area

**Collaboration/sandbox:**
Custom dashboards/data sources (ad-hoc/one off/adoption pilot) for each area

**UAT (staging) project:**
Content undergoing certification

**Archive project:**
Content that has been purged from any of the projects above
Getting Help

For me the textbook was necessary, but not sufficient.
Build a Data Culture for your organization

• Take the assessment
• Chat about your results with our experts
• Explore Learning Paths and earn a badge to show off your Tableau skills

Look for Tableau Blueprint under Activities in the app to learn more or visit the booth in Data Village
Final Thoughts
Please complete the session survey in the mobile app

View ‘My Evaluations’ in the menu or find your session under ‘Schedule’
Thank You
TABLEAU
CONFERENCE