Decisive Data Tableau Engagement Model Overview

SO WHAT'S THE RECIPE FOR SUCCESS? PARTNERSHIP

You may play **one** or **many** of these roles

Executive Sponsor

Present for
- kickoff call
- milestone (sprint) delivery

Time Commitment:
30 mins. - 1 hr. kickoff
30 mins. - 1 hr. sprint reviews

Project Champion

Engaged stakeholder

Provides
- Clarification when needed
- Feedback loop mid sprint
- Internal coordination
- Data preparation (if DD is not engaged in this phase)

Time Commitment:
5-10 hours per week

IT Resource

Provides credentials/access to necessary systems and databases before project start date. SLA expectations.

Database Administrator

Business data subject matter expert. Provides data dictionary if available.
Time Commitment: 1-2 hours per week

OPTIMAL DATA MODEL
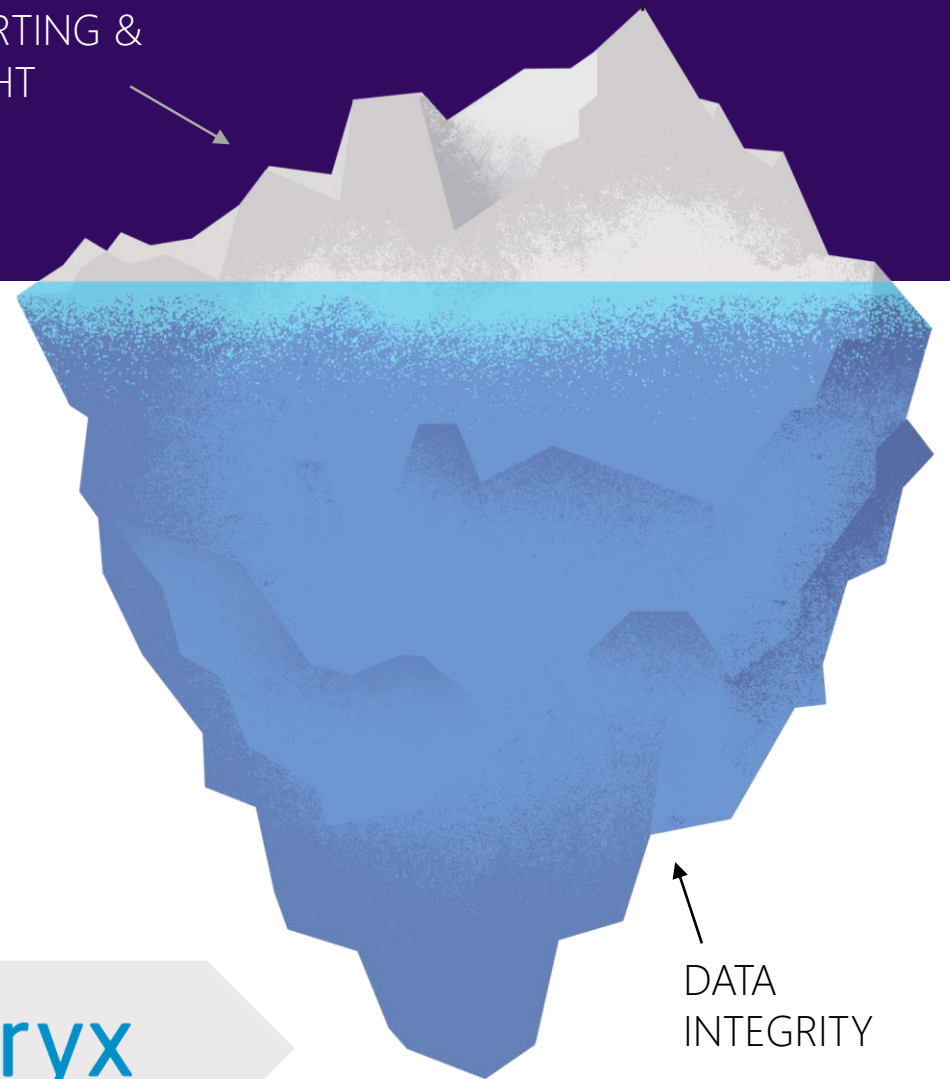
REPORTING & INSIGHT

One denormalized flat data source

- Join or Union tables before bringing into Tableau
- Speed of data retrieval dramatically improves
- Allows maximum flexibility for development and user experience

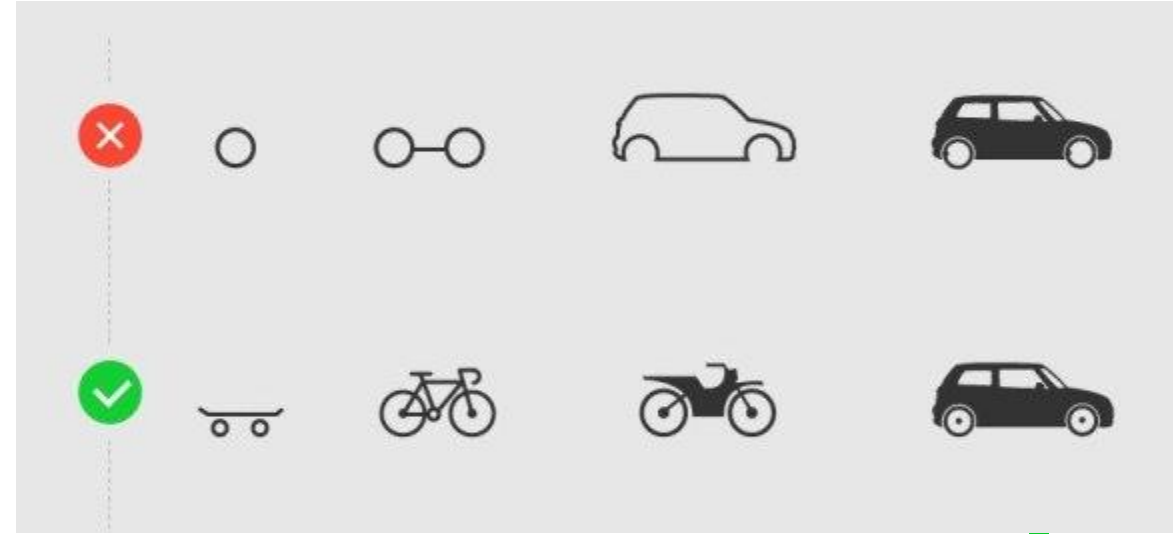## DD has the expertise to address business challenges below the surface

DATA INTEGRITY

snowflake   SQL   alteryx
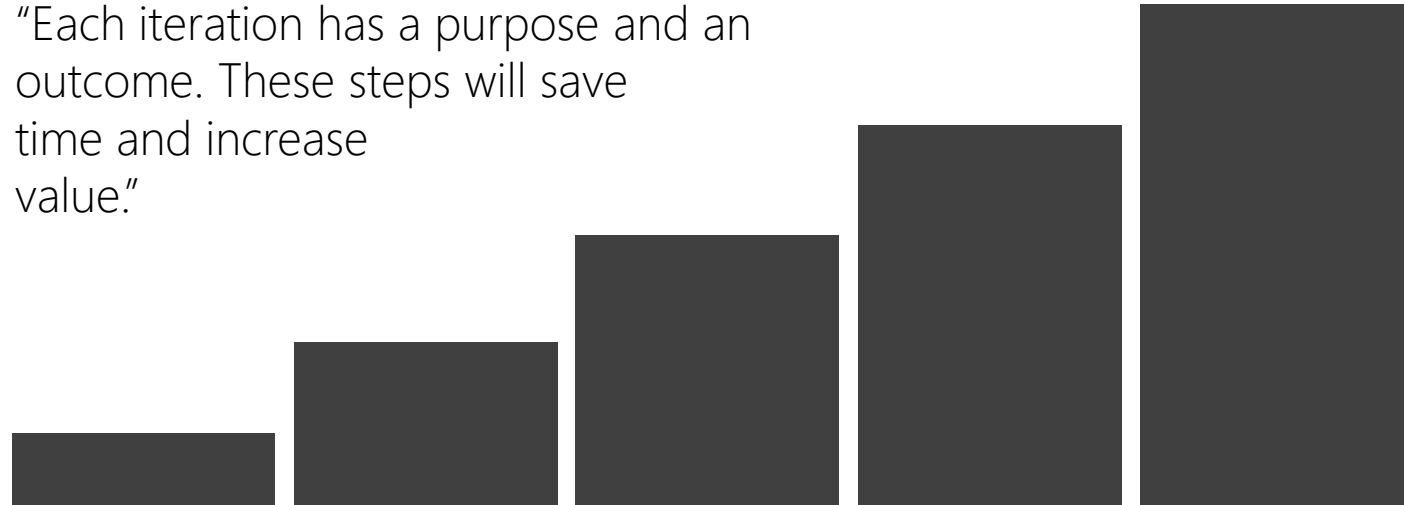
DD ITERATIVE APPROACH

DESIGN & DEVELOP

Minimum Viable Product (MVP)

1 Requirements Quad

2 White Board Wireframe

3 Tableau Draft Iteration

4 Tableau Final Iteration

"Each iteration has a purpose and an outcome. These steps will save time and increase value."

REQUIREMENTS QUAD

Time Committed: 1-2 hours

1 **Identify the path to success.**

- What is our objective? What is our primary business challenge?
- Analyze our audience to understand their behaviors and actions
- What kind of value will this dashboard drive within the organization?

Objective

Audience and Behavior

Priority Questions

Other Requirements

WHITE BOARD WIREFRAME

Time Committed: 2-3 hours

2 **Optimize time and create vision.**

- Understand the dashboard layout, visual hierarchy and flow
- Identify data necessary and advise on optimal data model
- More of what you want/need and less of "that's not what I was expecting (the negative kind)"
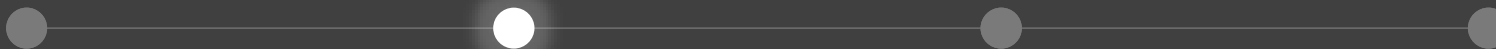
FUNCTIONAL DRAFT ITERATION

Time Committed: 10-16 hrs.

3 **Align wireframe with a functional outcome.**

- Ensure the integrity of the data
- Align functionality with desired user experience
- Build a backlog

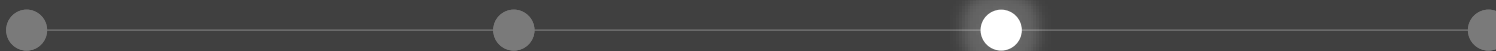# FUNCTIONAL FINAL ITERATION
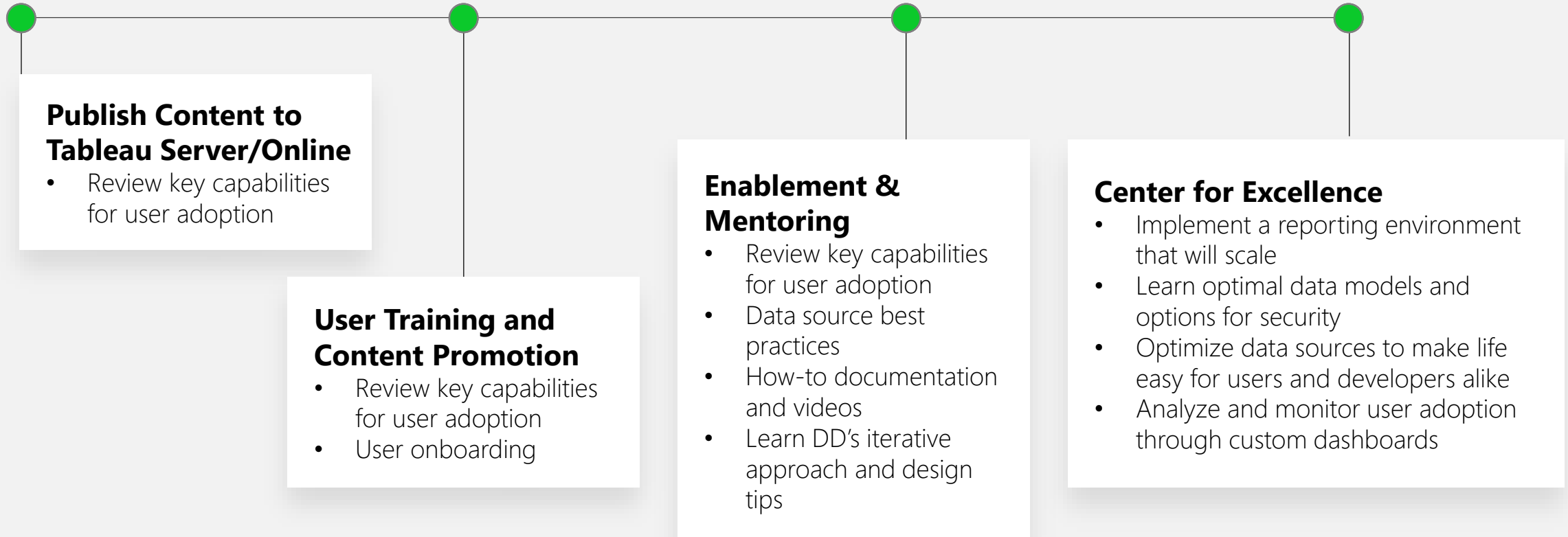
Time Committed: 8-12 hours

4 **Implement feedback, polish and introduce.**

- Implement change requests from draft iteration
- Complete a design audit for final polish
- Provide direction and UAT guidance

ROLLOUT STRATEGY AND ADOPTION IS KEY!

Increased Value

Publish Content to Tableau Server/Online
- Review key capabilities for user adoption

User Training and Content Promotion
- Review key capabilities for user adoption
- User onboarding

Enablement & Mentoring
- Review key capabilities for user adoption
- Data source best practices
- How-to documentation and videos
- Learn DD's iterative approach and design tips

Center for Excellence
- Implement a reporting environment that will scale
- Learn optimal data models and options for security
- Optimize data sources to make life easy for users and developers alike
- Analyze and monitor user adoption through custom dashboards

DATA VISUALIZATION TECHNIQUES

"Tell data stories that drive business impact"

❶ Tell a story

❷ Create questions for clarity

❸ Position by importance

❹ Choose appropriate visuals

❺ Allow for flexibility

❻ Use color to drive meaning

❼ Remove non-data ink

❽ Highlight for focus

❾ Layer dashboards

❿ Add the polish