



# Satisfying Your Organization's **Unmet Demand** for Tableau Data Visualization

Best practices on how you can capitalize  
on your organization's investment in Tableau



## A common theme among forward-thinking organizations is that there's a growing demand for business intelligence, data analytics, and visualization.

That's because leaders within those organizations, regardless of their function, understand the value of accessible and actionable business intelligence. Ultimately, this creates a demand that isn't being met largely due to the lack of know-how and the lack of capacity.

To make data-driven decisions, your organization has invested in Tableau. However, your departments may not be getting the most out of that valuable tool. In this white paper, we begin by presenting some best practices that your core departments can use to stop focusing on what the numbers are and start focusing on the story they tell.

Then we address how the pent-up demand for these visualizations and others can be addressed.



## Sales & Marketing Department Data Visualization Best Practices

Nearly every organization operates in a highly competitive ecosystem. That's why the sales and marketing departments are more important to the growth of the organization than they have ever been.

Sales leaders need actionable insights. They must be able to see and understand data so that they can make quick decisions to market conditions. And, marketing leaders have to be able to respond to the pressure to demonstrate their department's value to the organization.

With Tableau, users can improve their decision making, take action with confidence, and demonstrate their value to the organization. Here are some sales and marketing KPIs that Tableau can help visualize.



### Overall Return on Marketing Investment –

By looking at the data they are already collecting, marketing departments can measure how much revenue a marketing campaign is generating compared to the cost of running that campaign. This can then be compared to benchmarks that include internal projections, industry averages, month over month ROI, and year over year ROI. From there, leaders can identify opportunities for optimization.

### Cost Per Lead –

Organizations need to know how much it costs to acquire a customer. Visualizing the cost of acquiring a

customer through inbound or outbound marketing helps an organization directly account for new sales as well as allocating budgets for new campaigns.

### Lifetime Value to Customer Acquisition Costs –

It's important to be able to accurately measure the relationship between the lifetime value of a customer and the cost of acquiring that customer. This KPI gives leaders insight into how effective their marketing spending is while also providing data that justifies the level of customer acquisition spend.

### Product Placement –

Determining how shoppers travel

throughout a store helps organizations know where to place certain retail items. Tableau can help the sales and marketing departments visualize analytics relating to product placement and in-store sales.

### Website and Social Media –

Users can measure dozens of website and social media KPIs. However, the goal is to determine whether the organization is reaching and engaging with qualified people, and then turning those people into customers. Being able to visualize these metrics helps determine the success of marketing efforts and guides where resources should be spent in the future.

## Finance Department Data Visualization Best Practices

*The finance department is at the core of most of the organization's important decisions. With Tableau, the finance department can conduct their typical financial analyses and reporting with greater speed and efficiency. They can also provide the types of visualizations that help leaders get more insight and value out of the financial data.*



**Sales Pipeline** – Here is where sales data enhances the finance function. For finance to know whether the organization will have the capital it needs to operate, it's helpful to know the value of the sales pipeline 30, 60, and even 90 days into the future.

**Income Statement** – This is a bread and butter metric. And, like with all of the standard statements, the important thing is that the visualization is connected to live data. So, as things change over time the user always has up-to-date information.

**Purchase Orders** – Organizations that manage their expenses using purchase orders can get both a

high-level and detailed view of their status. For instance, they can examine purchase orders by vendor or how many purchase orders were issued in each quarter. It's also helpful to analyze average discounts by dollar and percentage.

**Expense Reports** – There are many ways to look at expense report data to determine how employees are spending the organization's money. Finance departments can view all of the expense types drilled down to the employee level as well as examine the top expense types as a percentage of total.





## Human Resources Data Visualization Best Practices

*One of the keys to success for any organization is their ability to attract and retain top talent while developing high-performing teams and programs. Here are some of the analytics that the HR department can use to leverage Tableau's powerful features.*

### Churn –

Every organization must deal with attrition. So, it's helpful to know which factors contribute to employees staying and which factors contribute to employees leaving the organization. Tableau can help users analyze data that include business travel, distance from home, percent salary increase, and work satisfaction to support retention and succession planning decisions.

### Compensation –

One of the reasons why an organization might be missing out on top candidates or losing valuable employees is that they are not paying competitively. Tableau can help leadership understand and manage their compensation plans by looking at external market data compared to internal salaries.

### Headcount Tracking and Forecasting –

Tableau can use data housed in multiple systems to monitor current headcount and understand how that headcount compares to each department's budget. With this data visualized, organizations can answer budgeting and headcount forecasting questions.

### Benefits Benchmarking –

By partnering with their benefits provider, organizations can use Tableau to pull in data that helps leaders see cost and utilization trends and how those trends compare to other companies. Benefits benchmarking is also an opportunity for HR to collaborate with the finance department in terms of sharing information about the organization's cost structure so that finance can use the most up-to-date data in their financial models.

### Diversity Metrics –

Organizations can group anonymous race and ethnicity along with gender data by role level and department. This analysis can help organizations determine the success of their diversity initiatives.



## IT Department Data Visualization Best Practices

*System uptime and downtime are no longer the primary metrics the IT department must measure. Today, this department is in the position of needing to measure and communicate IT costs and value in terms business leaders understand. When done effectively, leaders are able to invest in projects that facilitate growth and competitiveness.*

### Number of Tickets –

Tableau users can track and visualize the number of support tickets by day or month and see a progression of ticket status over time. This gives the IT department the ability to discover where opportunities for improvement exist.

### Service Delivery Time –

Tracking execution and delivery of projects is essential. It helps to monitor percent of projects completed on time, on budget, and on spec. This helps determine how efficiently and effectively the department is operating.

### IT Spend vs. Plan –

The IT department can be a better steward of technology expenditures and investments by visualizing whether the department spent what it expected to spend. This helps detect and correct spending anomalies before they become crises.

### Infrastructure Unit Costs vs. Target or Benchmarks –

By comparing infrastructure unit costs to either targets or benchmarks, the IT department can better determine how effective it is internally and how it compares to peer organizations. Additionally, this analysis helps leaders make decisions such as whether to outsource services or to migrate to the cloud.



Are you ready to achieve rapid value from BI and analytics? Then it's time to connect with Onebridge.

## The Unmet Demand for Data Visualizations

Data visualization can revolutionize the way leaders make decisions based on the best practices discussed above. However, there's an unmet demand for

those visualizations. Leaders in various departments want to be able to leverage all of Tableau's powerful data analytics features, but they're unable to. There are

two overarching reasons for this: limited knowledge and limited capacity.

### Limited Technical Expertise

In some cases, it all comes down to limited technical know-how. Whether it's the Sales and Marketing, Finance, IT, or HR department, users may not have the knowledge needed to put together

the desired visualizations. They want to make better data-driven decisions by being able to look at their data and make unlimited iterations on their visualizations. But, they don't know how

to use Tableau well enough. While they may try their hand at it, the demand still piles up.



### Limited Capacity

Even if people in your departments have the knowledge they need to create visualizations, there still may be a capacity issue. With all the work they already have on their plate, they simply don't have the time to get what they need from Tableau.

Additionally, it may be the case that every department looks to the IT department to create Tableau dashboards. But, the IT department is busy handling their core functions.

Even if users in the IT department are extremely savvy at Tableau, they can't possibly be called upon to handle all the demands from other departments for visualizations. And, the IT department isn't typically in the position to increase its capacity at a moment's notice. For instance, they can't scale from 3 visualizations in one month to 30 the next month.

Another thing happens when no one has the capacity to create visualizations.

Leaders lose speed to insight. If they have access to Tableau, visualizations are just not being completed in a timely manner. If they don't have access to Tableau, they're stuck using error-prone Excel workbooks and manually compiling data from disparate systems to get the knowledge they need. Not only does this take weeks instead of hours, the reports are not as effective at driving decision-making. Again, the demand piles up.

## Onebridge Satisfies Your Unmet Demand

You need a single solution to empowering your departments with the analytics and visualizations they need while also satisfying their unmet demand. Onebridge is that solution.

With Onebridge, you have access to a range of capabilities that we can integrate with your teams' knowledge to extend their technical capacity. Whether you need a combination of expert technical resources paired with consultants who understand the business process, or you would prefer

to outsource your entire business intelligence function, you can turn to us.

Our blended delivery model offers affordable managed business intelligence services that combine multiple resources for implementation, development, operation support, DIY training, and advisory consulting that help you maximize your investment in Tableau.

And, our business intelligence managed services are always the

right size to meet your users' demand for insight. Not only can we provide scalable on-demand analytics support, we also offer users self-service enablement – both in a flexible model that best suits their needs.

Additionally, our blended delivery model has the broader impact of freeing up valuable time within your departments. This empowers your people to focus on more strategic, value-added activities.



## Onebridge Is Your Business Intelligence and Analytics Partner

Your organization needs a data story, not another datasheet. When you work with Onebridge, you can get that story without overloading the IT department. And, there's no need to wait until your data is "perfect."

By leveraging our business intelligence and analytics expertise you can address the growing demand for insight-driven data within your organization. And, you can do so in a

way that is both flexible and scalable. Whether you use our services as an integrated part of your team or have us provide a fully managed solution, Onebridge is your business intelligence and analytics partner. We have a stake in your success.

To get easier access to insights that drive business results, connect with Onebridge at [onebridge.tech/data-analytics](https://onebridge.tech/data-analytics).

[How can we help?](#)





## About Onebridge

Onebridge delivers consulting solutions you need with a service delivery model you want. Our blended delivery model combined with our data analytics, application management, and quality and compliance consulting services, allows flexible access to diverse technical expertise.

We are dedicated to empowering creative, driven, and entrepreneurial personalities that enable fun, dynamic, and highly collaborative teams.

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