

Introduce Tableau to Your Organization



Bring data into the boardroom by building a learning culture and adopting new expectations for senior leaders and executives that require data to become a diplomatic agent and a counterbalance.

Ben Stroup



Problem: While the data conversation in leadership circles goes mainstream, too many organizations still hand over advanced analytics to internal departments that are too far removed from the decision-making table to make a meaningful impact in the learning culture of an organization.

Opportunity: Bring data into the boardroom by building a learning culture and adopting new expectations for senior leaders and executives that require data to become a diplomatic agent and a counterbalance to the unmitigated confidence dependent on past success.

Resolution: Incorporate all organizational leaders into the data conversation by equipping them with a world-class solution and framework for use that will empower and equip everyone to participate from an informed position.

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Data visualization is mainstream. It's no longer the bleeding edge, but it's not yet been fully normalized in leadership circles. It needs to be—now. The uptick in conversations around the leadership table about how to use analytics to inform strategic decisions and monitor leading and lagging performance indicators signals an accelerated adoption rate that is promising.

The most important diplomatic partner in the decision-making process is data. Creating data visualizations once required a quantitative analyst and a coder. Not anymore! Tools like Tableau eliminate the complexity for citizen analysts to participate in the data conversation. And the more people involved from an informed position is a win for any organization—especially leadership bodies.

Analytics and business intelligence are no longer departments that outsource their reporting, data visualization, and statistical analysis. Rather, they reflect leadership disciplines that point to opportunities across companies. If you're serious about integrating data visualization into your strategic planning process, then you need a roll-out plan that will yield a successful adoption rate.

4 Necessary Elements when Introducing Tableau

1. **Make sure you have a champion in the C-Suite.** Nothing is more important than senior leadership setting the tone around data expectations. It can be tempting to allow past success to cloud your judgment or for you to presume that previously good decisions are still good without challenging or validating those assumptions with data. Without the C-Suite, you'll find appeasement from the executive team rather than advocates.
2. **Invest at a level that allows a broad base of leadership to participate in the rollout.** If only your business analytics team gets on board, then Tableau will be just another specialized tool

for a specialized role. Instead, involve non-traditional analysts in the rollout process. That includes executive leaders.

3. **Plan for education initiatives to create a common language, framework, and approach.** Not everybody loved statistics the first time around in college, but it's vitally important when it comes to data visualization. Understanding the relationship between disparate pieces of data can unlock new insights that lead to new possibilities.
4. **Make data available to everyone with a Tableau Desktop license for creators and a Tableau Online license for easy sharing.** If you're going to put a tool like Tableau in front of an executive or senior leader, make the underlying data accessible too. Nothing is more irritating than knowing you have a world-class solution but are unable to access the data needed to fuel it. This is the only way you can ensure everyone comes to the table with an informed perspective. As a result, you will be able to push back against "gut-driven" narratives and establish common ground between quants and non-quants so that everyone is operating from the same knowledge base.

5 Signs You Have a Majority Leadership Adoption Rate

1. When preparing from group meetings, leaders are asking questions about what they are finding in the data and its meaning.
2. Leaders are asking questions about the source of the data, why certain data doesn't exist, and if it's possible to capture it.
3. Leaders are evaluating their recommendations using the dimensions and measures available to them in Tableau.
4. Leaders are bringing more informed and complex questions to the BI team for further investigation and more complex analysis.
5. Leaders trust the data and are willing to adapt assumptions, plans, and strategies to align with what the data is revealing.

Progressing Step by Step

None of this happens overnight. In fact, it might take years for Tableau to fully become part of your organization's decision-making culture. But any step toward that reality today is accomplishing two things:

1. You are shaping executives prepared to lead into the unknown realities of a rapidly changing marketplace.
2. You are building strength and confidence in your data, which is leading to operational efficiencies, a higher propensity to achieve forecasted outcomes, greater capacity to identify root causes and gaps, and improved impact measures overall.

You can't become a learning organization if you aren't willing to learn.

Far too many executives are removed from the daily tension of the marketplace. As a result, they lack a sense of urgency to adapt their habits to the accelerating rate change happening all around them. But even more important, without the humility required to learn, they are blinded by personal bias and past successes. This will stunt their thinking, planning, and capacity to introduce new ideas that will create opportunities for growth.

The best thing you can do for your organization today is to put a stake in the ground. Stand for a culture of data-informed thinking, experimentation, and learning. Today's decisions will impact tomorrow's workflows, investments, and focus. You can't afford to get it wrong. As more and more data becomes available to everyone, your competitors and your market won't tolerate you operating without it.

About

Ben Stroup is Chief Growth Architect and President at Velocity Strategy Solutions where he helps leaders design, develop, and deploy smarter business growth strategies. Ben is a futurist, disruptor, and data champion. He leads a team that takes a structured learning approach to business challenges, which allows them to assist leaders in bridging the gap between ideas, innovation, and revenue—taking ideas from mind to market.

Velocity Strategy Solutions is an on-demand, next-generation business strategy and management consulting firm which provides clients with a relentless focus on data, execution, and results that positively impact the bottom line. Velocity delivers integrated people and revenue strategies combined with a disciplined approach to growth architecture that elevates the capacity of leaders, teams, and organizations to succeed and win more.