



**DATA REIMAGINED**

**BLUEPRINT**

**JANUARY 2020**

# Data Reimagined Blueprint Tableau Model Implementation

## The Data Reimagined Blueprint

The Data Reimagined Blueprint incorporates the best of the strategy development services we offer--from KPI development to stakeholder education to AI/NLP to Smart Analytics. It can be your roadmap for a successful Tableau® model that provides actionable business intelligence and promotes a data-driven culture. This is a collaborative effort and we work with you to create a Tableau business intelligence model that achieves the objectives outlined in your Blueprint.

Each implementation is different but this is the most commonly-followed process.

### Blueprint

- Define requirements--including such elements as [Explain Data](#) or Ask Data--and expected outcomes
- Identify data sources and stakeholders
- Determine [governance](#) requirements
- Create analytics strategy blueprint
- With the help of use cases, create data management strategy
- Create framework for a [data-driven culture](#)
- Tableau® implementation strategy, including monitoring

### Blueprint Implementation

- Tableau® implementation begins with data access, data discovery and data preparation
- Stakeholders, including [citizen data scientists](#), are introduced to and trained on data access, model use, monitoring, and reporting

# Data Reimagined Blueprint Tableau Model Implementation

- The model is put in place and tested by end users; adjustments are made, as necessary
- [Data management plan](#) is created, including such elements as data access, backup, security, and preservation
- The model is reviewed for alignment with the Blueprint and user requirements.

*Work with us and we will create a Tableau model that is user-friendly and useful.*

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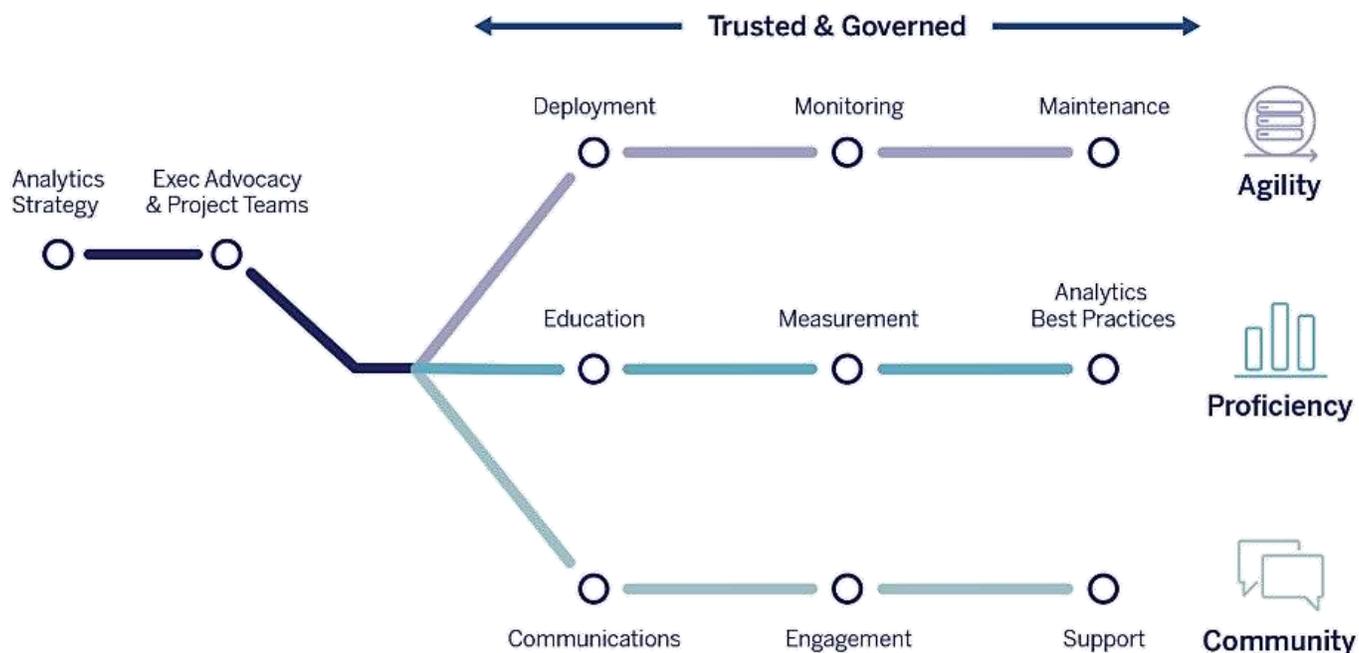
Download the Word version [here](#) and the Excel version [here](#).

## **The Tableau Blueprint Planner**

This Excel-based planner contains questions that can help you to implement your Tableau model successfully. Your answers will inform activities at every stage and every workstream in the [Tableau Blueprint](#). The following areas are covered within the planner:

- Analytics Strategy
- Roles and Responsibilities
- Enterprise Architecture Survey
- Data and Analytics Survey
- Use Cases and Data Sources
- Users
- Community

# Tableau Blueprint Planner



This workbook is based on the Excel-based [Tableau Blueprint Planner](#). The content has not been modified. It has simply been reformatted in part to make it easier to use. Where numbered lists begin (with one), additional items can be added. Rows can be deleted or added. Download the Word version [here](#) and the Excel version [here](#).

# Tableau Blueprint Planner

## Analytics Strategy

To define your analytics strategy, you should start with your organization's strategic initiatives and KPIs, metrics, or desired outcomes. By linking these initiatives to data and analytics, you can use them as a driver of change. Next, document any challenges or risks to the process. Suitable metrics—especially for measuring behavioral changes—will vary for each organization, and should be evaluated at regular intervals as analytics practices evolve. Finally, establish your Tableau-specific goals. Reference the Discovery and [Executive Advocacy and Project Team](#) topics for more information.

## STRATEGIC INITIATIVES

### Initiative 1

**NAME:**

**DESCRIPTION:**

**KPIS/METRICS/OUTCOMES:**

1.

### Initiative 2

**NAME:**

**DESCRIPTION:**

**KPIS/METRICS/OUTCOMES:**

1.

### Initiative 3

**NAME:**

**DESCRIPTION:**

**KPIS/METRICS/OUTCOMES:**

1.

### Initiative 4

**NAME:**

**DESCRIPTION:**

**KPIS/METRICS/OUTCOMES:**

1.

# Tableau Blueprint Planner

## Challenges or Risks

Challenge/Risk 1

**NAME:**

**DESCRIPTION:**

**MITIGATING FACTORS**

1.

Challenge/Risk 2

**NAME:**

**DESCRIPTION:**

**MITIGATING FACTORS:**

1.

Challenge/Risk 3

**NAME:**

**DESCRIPTION:**

**MITIGATING FACTORS:**

1.

Challenge/Risk 4

**NAME:**

**DESCRIPTION:**

**MITIGATING FACTORS:**

1.

Challenge/Risk 5

**NAME:**

**DESCRIPTION:**

**MITIGATING FACTORS:**

1.

# Tableau Blueprint Planner

## Tableau Business Goals

### Tableau Business Goal 1

**NAME:**

**DESCRIPTION:**

**KPIS/METRICS/OUTCOMES:**

1.

### Tableau Business Goal 2

**NAME:**

**DESCRIPTION:**

**KPIS/METRICS/OUTCOMES:**

1.

### Tableau Business Goal 3

**NAME:**

**DESCRIPTION:**

**KPIS/METRICS/OUTCOMES:**

1.

### Tableau Business Goal 4

**NAME:**

**DESCRIPTION:**

**KPIS/METRICS/OUTCOMES:**

1.

### Tableau Business Goal 5

**NAME:**

**DESCRIPTION:**

**KPIS/METRICS/OUTCOMES:**

1.

# Tableau Blueprint Planner

## Roles and Responsibilities

Executive sponsors working with the project team need to consider not only how to scale the technology, but the adequate support, training, and management structure to effectively navigate change management alongside adoption, overcoming the organizational roadblocks to become a data-driven enterprise. Maximizing analytics investments and capitalizing on the transformative potential of data means that everyone encountering it—regardless skill levels and data fluency—must be able to turn insights into opportunities or innovations. In the table below, identify members of the cross-functional team who are responsible for understanding current/future state capabilities, challenges, and goals, set the vision for next 18 months with project scope, prioritization, success measures, hold regular meetings, gather/respond to feedback, and document value. Reference the [Executive Advocacy and Project Team](#) topics for more information.

EXECUTIVE ROLES	RESPONSIBILITIES	TEAM MEMBERS
<b>EXECUTIVE SPONSOR</b>	The Executive Sponsor sets the vision for modern analytics, aligns projects to transformational initiatives, nominates staff for advocacy roles, and ensures accountability.	
<b>IT SPONSOR</b>	The IT Sponsor is responsible for Tableau installation, configuration, and maintenance, partners with business leaders and SMEs, enables secure, governed data access, and transitions content authoring to business users.	
<b>ANALYTICS SPONSOR</b>	The Analytics Sponsor implements the vision for modern analytics, ensures the availability of data and content, establishes education plans and learning paths by organizational job functions, and facilitates communication throughout the user community, and aggregates business value achieved.	
<b>LINE-OF-BUSINESS SPONSORS</b>	Line-of-Business sponsors advocate for data-driven decision making within their respective teams, promote content authoring and governed access, encourage collaboration and sharing, and document business value.	

# Tableau Blueprint Planner

PROJECT TEAM ROLES	RESPONSIBILITIES	TEAM MEMBERS
<b>ANALYTICS DIRECTOR</b>	The Analytics Director owns the analytics program, including placement and fit of analytics use cases within the organization and alignment with strategic initiatives.	
<b>ENTERPRISE ARCHITECT</b>	The Enterprise Architect identifies technical requirements and integrates Tableau with enterprise architecture standards.	
<b>SECURITY ADMINISTRATOR</b>	The Security Administrator ensures the company complies with its internal policies and external regulatory requirements, establishes and administers the overall strategies and procedures for the information security function, and evaluates risk and promotes information security awareness.	
<b>DATABASE ADMINISTRATOR</b>	The Database Administrator is responsible for the administration, monitoring, maintenance, and security of databases in the organization. The DBA will assist with modeling, structuring, and optimizing sources of data that connect to Tableau.	
<b>SYSTEMS ADMINISTRATOR</b>	The Systems Administrator installs, configures, manages, and maintains the Tableau deployment in the data center or in the cloud, while enforcing company policies in compliance with business and technology strategy.	
<b>DESKTOP ADMINISTRATOR</b>	The Desktop Administrator installs and configures client software including database drivers, Tableau Desktop, Tableau Prep, and Tableau Mobile.	
<b>NETWORK ADMINISTRATOR</b>	The Network Administrator maintains network communications and connectivity.	
<b>PROJECT MANAGER</b>	The Project Manager ensures that the project is delivered on time and within budget by ensuring the project is effectively staffed, managing relationships with a wide range of groups, allocating and utilizing resources in an efficient manner, and maintaining a cooperative, motivated and successful team.	
<b>COMMUNITY LEADER</b>	The Community Leader coordinates efforts related to user enablement, including support resources, engagement events, connecting users within your company, and analytics evangelism. Note: Not all organizations will have a dedicated position for these responsibilities.	

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<b>TABLEAU ADMINISTRATOR ROLES</b>	<b>RESPONSIBILITIES</b>	<b>TEAM MEMBERS</b>
<b>TABLEAU SERVER ADMINISTRATOR</b>	The Server Administrator has full access to Tableau Server configuration settings, all sites on the server, users and groups, and all content assets, such as projects, data sources (including connection information), and workbooks to monitor and maintain overall server health.	
<b>TABLEAU SITE ADMINISTRATORS</b>	Tableau Site Administrators create and manage the site's users and groups, create projects to organize content on the site, and assign permissions to allow users (groups) to access the content. They also promote and certify content and measure the use of analytics within their site.	

<b>TABLEAU CREATOR ROLES</b>	<b>RESPONSIBILITIES</b>	<b>TEAM MEMBERS</b>
<b>DATA STEWARD</b>	Data Stewards have an understanding of the business domain and the interaction of business processes with analytics. A Data Steward ensures that there are documented procedures and guidelines for data access and use and will work with Database Administrator and/or Data Engineers to plan and execute an enterprise-wide data governance, control and compliance policy.	
<b>CONTENT AUTHORS</b>	Content Authors create and publish dashboards and data sources. They will also be a resource for others ramping up their Tableau skills.	

# Tableau Blueprint Planner

## Enterprise Architecture Survey

As you are planning your deployment, the IT team should document the current enterprise architecture by completing the Enterprise Architecture Survey. Because Tableau is integrated with hardware, network, databases, and applications, understanding how all these things interoperate is key for installation and configuration and ongoing platform operations. Reference the Deployment topics for more information.

### Area

QUESTION	RESPONSE	TECHNOLOGY/VENDOR
Where will you deploy-on-premises, public cloud, or hosted?		
What is your enterprise standard build/specs? (cores, VM, RAM)		
What is your enterprise server operating system?		

### High Availability/Disaster Recovery

QUESTION	RESPONSE	TECHNOLOGY/VENDOR
Is Tableau Server mission-critical, requiring high availability?		
What is the recovery time objective (RTO)?		
What is the recovery point objective (RPO)?		

### Security

QUESTION	RESPONSE	TECHNOLOGY/VENDOR
What is your enterprise authentication protocol? (Active Directory, LDAP, SAML)		
What is your security policy for service accounts related to Tableau Server?		

### Network

QUESTION	RESPONSE	TECHNOLOGY/VENDOR
Is SSL required?		
What is your policy on gateway ports over http/https?		
Are there any port restrictions?		
Is internet access from servers permitted?		
Will users access the server externally?		

### External Services

QUESTION	RESPONSE	TECHNOLOGY/VENDOR
Will you be integrating external services (R Server, Python, MATLAB, WMS)?		

# Tableau Blueprint Planner

## Operations

QUESTION	RESPONSE	TECHNOLOGY/VENDOR
What are your enterprise software management tools? (server, client, mobile)		
What are your enterprise monitoring tools? (SCOM, Splunk, etc.)		
How many environments do you require for servers? (dev, UAT, prod)		
What processes exist for backup/restore?		

## Client Software

QUESTION	RESPONSE	TECHNOLOGY/VENDOR
How is client software deployed - Desktop, Prep, Mobile?		

## Automation and Extensibility

QUESTION	RESPONSE	TECHNOLOGY/VENDOR
What are the requirements for automation, customization? (APIs needed)		

## Licensing

QUESTION	RESPONSE	TECHNOLOGY/VENDOR
What is the license type (role-based subscription, core, embedded)?		
Is there a chargeback model?		

## Data

QUESTION	RESPONSE	TECHNOLOGY/VENDOR
What database technologies (on-premises and cloud) are sources of data?		
What file-based sources of data will be used? (network folder access)		
What security policies exist for database service accounts, user accounts?		
What are your classifications for data security? (secret, confidential, internal, public)		
Do you have any data that is restricted to geographic region?		
Are there external and/or government regulations to comply with?		
Are there row-level security requirements?		

# Tableau Blueprint Planner

## Data and Analytics Survey

Before the deployment of Tableau software, each Line-of-Business Sponsor should survey their departments/teams to help them prioritize sources of data and training needs. Each business team who will be using Tableau should complete the Data and Analytics Survey or work with an IT team member to facilitate documentation of the information. The purpose of the survey is to identify sources of data that are important to their job functions, prioritize which of these data sources will be certified and available at launch, and plan end user training needs. After teams complete this information, you will use it to prioritize and categorize the published data sources. Reference the [Analytics Strategy](#) topics for more information.

**Division:**

**Department:**

**Team:**

## Selection and Management

QUESTION	RESPONSE	TECHNOLOGY/VENDOR
What business problems/questions need to be solved/answered?		
What are the key sources of data for the team?		
How does your team source data? (data warehouse, file exports, third-party)		
How often does the data change?		

## Security

QUESTION	RESPONSE	TECHNOLOGY/VENDOR
How is data secured?		
Will row-level security or personalization for each user be needed?		

## Distribution (Current State)

QUESTION	RESPONSE	TECHNOLOGY/VENDOR
How is data distributed?		
How frequently is data distributed?		
What formats are used?		
Who prepares reports for distribution?		
Who are the recipients?		

# Tableau Blueprint Planner

## Consumption (Current State)

QUESTION	RESPONSE	TECHNOLOGY/VENDOR
How is data consumed? New or existing datasets?		
Do consumers export and perform additional manipulation in context of your team?		
How is data used in context of recipient's job/role?		

## Skills

QUESTION	RESPONSE	TECHNOLOGY/VENDOR
What analytical skills and capabilities exist within the team?		
What analytical skills and capabilities need to be developed?		
Who will be identified and trained as the Tableau Champion(s) within the team?		

# Tableau Blueprint Planner

## Data and Content Governance

In Tableau, you govern two things: data and content. Different kinds of data and content require different kinds of governance. To help you define your organization's standards, policies, and procedures, you should complete the matrix below by entering who is responsible, what processes are needed to support it, and when it occurs. Your governance models combine people, process, and technology and creates accountability and enables, rather than restricts, access to secure and trusted data and for all skill levels in your organization. This makes governance a shared responsibility. Acknowledging that varying degrees of governance are required, these principles can be right-sized and applied to any kind of data regardless of where it falls in the governance spectrum. Like other Tableau platform management activities, an agile, iterative approach is needed to adapt to the evolving requirements as user adoption and engagement increase. Reference the [Governance](#) topics for more information.

		GOVERNANCE MODEL		
DATA GOVERNANCE	DESCRIPTION	CENTRALIZED	DELEGATED	SELF-GOVERNING
DATA SOURCE MANAGEMENT	Data source management includes processes related to selection and distribution of data within your organization.			
DATA QUALITY	An assessment of data's fitness to serve its purpose in a given context.			
ENRICHMENT AND PREPARATION	Processes used to enhance, refine or prepare raw data for analysis			
DATA SECURITY	Protective measures that are applied to prevent unauthorized access to data			
METADATA MANAGEMENT	The end-to-end process for creating, controlling, enhancing, attributing, defining and managing a business-friendly semantic layer of data			
MANAGEMENT AND MONITORING	Process used to measure successful job execution			

# Tableau Blueprint Planner

		GOVERNANCE MODEL		
CONTENT GOVERNANCE	DESCRIPTION	CENTRALIZED	DELEGATED	SELF-GOVERNING
CONTENT MANAGEMENT	Processes used to keep workbooks and data sources fresh and relevant			
SECURITY AND PERMISSIONS	Process of user authentication and authorization to consume content			
CONTENT VALIDATION	Process used to verify that content has reached operational state			
CONTENT PROMOTION	Process used to verify that content is correct			
CONTENT CERTIFICATION	Process used to bring content from sandbox project to production project			
CONTENT UTILIZATION	Processes used to measure user engagement			

# Tableau Blueprint Planner

## Use Cases and Data Sources

To identify initial use cases, you will use the information gathered in the Data and Analytics Survey from every participating team to discover and prioritize which sources of data will be most impactful by audience. If you are just getting started or transitioning from a traditional top-down approach driven by IT to governed self-service, it is advantageous for IT or a centralized BI team to build the initial use cases across departments, including trusted data sources and dashboards. Reference the [Analytics Strategy](#) topics for more information.

DATA SOURCE/ SOURCE OF DATA	DESCRIPTION	DEPARTMENT	DATA STEWARD/OWNER NAME	LAUNCH DATE	EXPECTED AUDIENCE			
					CREATORS	EXPLORERS	VIEWERS	TOTAL
							<b>TOTAL</b>	0

# Tableau Blueprint Planner

## Education Role Mapping

Each organizational role or job function has a relationship to data that you should identify and map to Tableau roles. Assessing the skills required to operate Tableau in each organizational role requires an understanding of which tasks can be completed with each product, plus an understanding of how those products correlate to Tableau licenses that are detailed above. Enter your job titles that correspond to each of the [Education Roles](#) below and/or customize to fit your requirements.

EDUCATION ROLE	DESCRIPTION	JOB TITLES
<b>EXECUTIVE SPONSOR</b>	Executive Sponsors are responsible for driving the decisions and strategies that enable their organization's continued growth and success. They understand market pressures, what it takes to stay competitive, and how to lead their organization forward. These leaders recognize, embrace, and promote the importance of implementing a data-driven culture to gain competitive advantage and understand the power of Tableau to achieve that goal. License types vary for Executive Sponsors based on where they are most active in their business.	
<b>CONSUMER</b>	Consumers use data to make more informed decisions for their lines of business. They can range from administrative assistants to C-suite executives, but they share a goal of making better, more informed business decisions based on dashboards and reports others in their organization produce.	
<b>AUTHOR</b>	Authors have a strong understanding of their market and business objectives, and they recognize the importance of making data-driven decisions. They leverage their foundational Tableau skills to make smarter business decisions more quickly by digging into their available data sources to create visualizations and dashboards mostly for their own consumption. Authors likely have a Creator license, but may also author on the web with an Explorer license.	
<b>DESIGNER</b>	Designers create visualizations and dashboards that help stakeholders across their organization absorb information quickly and easily. They leverage Tableau to deliver beautiful, functional, and impactful dashboards. They draw on their appreciation of the art of visual design as a clear communication tool and on their understanding of the impact that clear and engaging visualizations can have on both internal and external audiences.	

# Tableau Blueprint Planner

<b>ANALYST</b>	<p>Analysts are responsible for supporting their lines of business to deliver valuable insights from data. Analysts work with complex data sources, use advanced calculations to customize data, and use advanced features (parameters, sets, filters, and forecasting) to build a range of charts and to analyze a variety of data types. Analysts perform ad-hoc analysis to help explore new data questions, produce well-designed interactive dashboards that present data accurately, and create and share data insights within their organizations for the purpose of guiding business decisions and outcomes.</p>	
<b>DATA STEWARD</b>	<p>Data Stewards understand the business domain and the interaction of business processes with analytics. Data Stewards ensure there are documented procedures and guidelines for data access and use and work with Database Administrators and/or Data Engineers to plan and execute an enterprise-wide data governance, control and compliance policy. Within Tableau, they work to curate and manage certified data sources with set user permissions in accordance with enterprise governance policies.</p>	
<b>DATA SCIENTIST</b>	<p>Data Scientists are experts at deriving valuable insights for large and varied data sets. They are adept at tackling big data, know how to apply advanced analytic capabilities to answer business questions, are often domain experts, and work collaboratively across the business and IT to deliver ROI from data. They can reduce data cleansing and preparation time in Tableau Prep Builder, use Tableau Desktop for exploratory analysis, and develop final dashboards to support and clearly present project findings.</p>	
<b>DEVELOPER</b>	<p>Developers translate the needs of the business into the software tools, applications, and automated processes that keep their organizations lean, smart, and efficient. They leverage Tableau to create new data products, embed visualizations and dashboards into current solutions, improve analysis processes, and integrate organizational insights into other external platforms and portals.</p>	
<b>SITE ADMINISTRATOR</b>	<p>Site Administrators manage, monitor, and maintain sites on Tableau Server or Tableau Online. They manage site organization, content publishing, groups, users, and permissions. Through their monitoring efforts, they know the latest details on site utilization, adoption, performance, and compliance. Site Administrators are key to the adoption of Tableau Server or Tableau Online in their organizations.</p>	
<b>SERVER ADMINISTRATOR</b>	<p>Server Administrators ensure that their installation of Tableau Server runs smoothly. Key elements include securing the server, managing licenses, managing users, monitoring and troubleshooting server issues, and performing server maintenance. Server Administrators work tirelessly to ensure that Tableau Server is not only operational but meets the ongoing needs of the enterprise.</p>	

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<b>SERVER ARCHITECT</b>	Server Architects plan Tableau Server deployments and ensure their success. Key success factors include integrating the deployment with preferred authentication options, monitoring server, and scaling server overtime to meet enterprise demand. Once implementation is complete, server architects maintain the deployment and help to investigate and resolve server issues.	
<b>COMMUNITY LEADER</b>	Community Leaders are responsible for coordinating efforts related to user enablement around communications, engagement, and support. Most Community Leaders also fall into a role with heavy product usage, and will require a Creator subscription to understand how others are using Tableau.	

# Tableau Blueprint Planner

## Community

When you deploy Tableau broadly across your organization, establishing internal communications, user enablement resources, engagement activities, and support methods will promote adoption to scale data and analytics more efficiently. Reference the [Communications](#), [Engagement](#), and Support topics for more information.

COMMUNICATIONS	ASSIGNED TO	DUE DATE
GETTING STARTED		
FAQ		
SUPPORT OPTIONS		
ANNOUNCEMENTS		
USER DIRECTORY		
GOVERNANCE MODELS		
DATA PLATFORMS		
CERTIFIED DATA		
ANALYTICS BEST PRACTICES		
VISUAL STYLE GUIDE		
EVENTS CALENDAR		
LEARNING PLANS		
TRAINING VIDEOS		
COMPANY EDUCATION CALENDAR		
USER GROUP RECORDINGS		
ANALYTICS BLOG/NEWSLETTER		
DISCUSSION FORUMS AND CHAT		

ENGAGEMENT	ASSIGNED TO	DUE DATE
INTERNAL USER GROUP		
INTERNAL ADMIN GROUP		
LUNCH AND LEARN		
VIZ GAMES		
TABLEAU DAY/ANALYTICS DAY		

SUPPORT	ASSIGNED TO	DUE DATE
USER SUPPORT PROCESS		
CHAMPION DEVELOPMENT		
SKILLS PYRAMID		
MENTORING		

# Tableau Blueprint Planner

## Tableau Users

Identify users in each department and their license level, site role, and learning path. If your license counts are high, define user personas to classify different types of users using the education role mapping approach. Designate at least one champion per department. Reference the [Analytics Strategy](#) and [Education](#) topics for more information.

NAME	DEPARTMENT	LICENSE LEVEL	SITE ROLE	EDUCATION ROLE	ONBOARD DATE	CHAMPION*?

**License Levels:** Creator, Explorer, Viewer

**Champion:** Individuals who possess the skills necessary to maximize the impact of data and analytics using visual best practices in their business domain. Initially, this starts with the content creators who are part of the project team. They will connect users who are analyzing similar data and identify cross-functional collaboration opportunities across the organization. By involving champions in new user onboarding within their department or team, champions will help to orient those who are new to Tableau and promote the use of data and analytics for making business decisions.