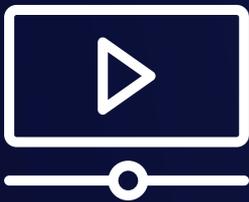
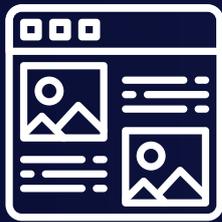


tableau®

# BLUEPRINT

## MINI GUIDE





## WELCOME TO YOUR TABLEAU BLUEPRINT GUIDE

Tableau Blueprint is the methodology to help your organization become data-driven and have trusted and governed data. It's not something new but if put in place successfully will allow you to infuse a data culture and scale your Tableau deployment. To help you understand Tableau Blueprint and put it in place, we've created a mini guide with everything you need to know.

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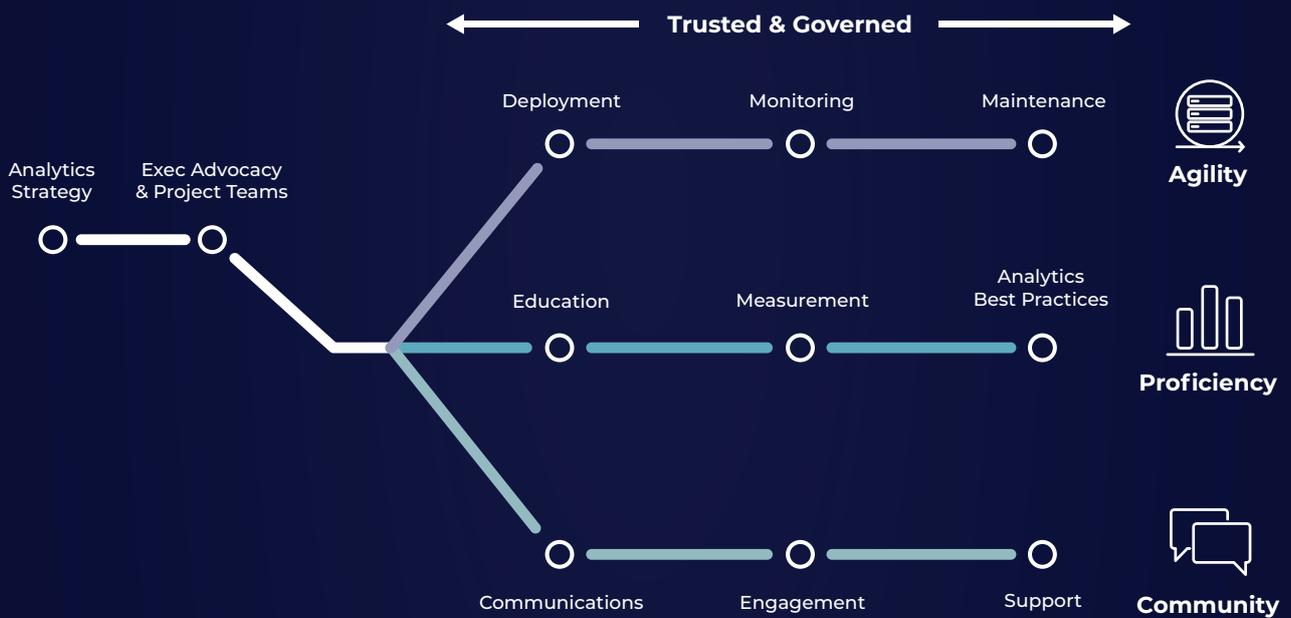
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# Chapter 1

## WHAT IS TABLEAU BLUEPRINT?



# IN DATA WE MUST TRUST

During a **2021 Tableau user group**, Jeremy Blaney quoted “*Data gives people a superpower and when people tap into that power they do incredible things.*” Today, more and more organizations are using data to make decisions and striving to have self-service analytics. To become data-driven, organizations need to have data that users trust, however, four out of five CEOs don’t trust the data upon which they make their decisions (KPMG, 2019). At **Wiiisdom**, we believe that to have this trust organizations need to implement agile methodologies to truly maximize the value of Analytics. In order to do this, Tableau introduced Tableau Blueprint to give organizations a framework they can rely on and scale to become data-driven. This mini guide will explain what it all entails.

## WHAT IS TABLEAU BLUEPRINT?

Tableau Blueprint is a step-by-step methodology to help a whole organization become data-driven. In essence, the framework provides the rules of the road to establishing governance and enabling higher adoption of Tableau. Tableau Blueprint isn’t something new but it’s a proven methodology with a common vocabulary that allows BI and Analytics leaders to answer all the why questions and to find opportunities from the data in their analytics platforms. It equally helps build a data culture within an organization, in other words, data is woven into all aspects of a business in order to be fully data-driven.

The Tableau Blueprint framework takes you on its own subway journey with station stops along the way to teach and show organizations the best practices of becoming data-driven. One station stop is equally important as another because combined it gives the keys to any organization to use Tableau and self-service analytics in the best way possible. In the next section, I’ll take you on a quick journey along the Tableau Blueprint subway to show you the steps to success.



# THE TABLEAU BLUEPRINT SUBWAY JOURNEY

In any data-driven organization, you will find agility, proficiency, and community; three capabilities that should be at the heart of a business. Measuring and understanding the impact they have on an organization’s transformation with data and analytics is vital to fulfilling Tableau Blueprint, and it’s here where governance becomes critical in order to have successful self-service analytics.



# Agility

The first route on the Tableau Blueprint subway is towards **Agility**. To achieve Agility there are three stops along the way; deployment, monitoring, and maintenance. The focus here is on ensuring room for flexibility in choice to meet today's technology needs and those of the future.

1. Deployment: building, sizing, and securing your analytics environment.
2. Monitoring: maintaining availability, capacity, utilization, and user engagement.
3. Maintenance: implementing automated testing processes to support the increased use of analytics.



# Proficiency

Subway route number two is **Proficiency** with three other stops to reach it; education, measurement, and analytics best practices. According to **McKinsey**, education is one of the top five challenges to reaching a company's objective of becoming data-driven, therefore it's important to put plans in place to involve everyone within an organization. The Proficiency route focuses on educating and best practices to increase data fluency.

1. Education: creating learning plans for every employee along with ways to validate the knowledge learned.
2. Measurement: ensuring the data and content is being consumed by measuring user engagement and adoption.
3. Analytics Best Practices: providing documentation to all users and introducing best practices that drive informed decision-making.



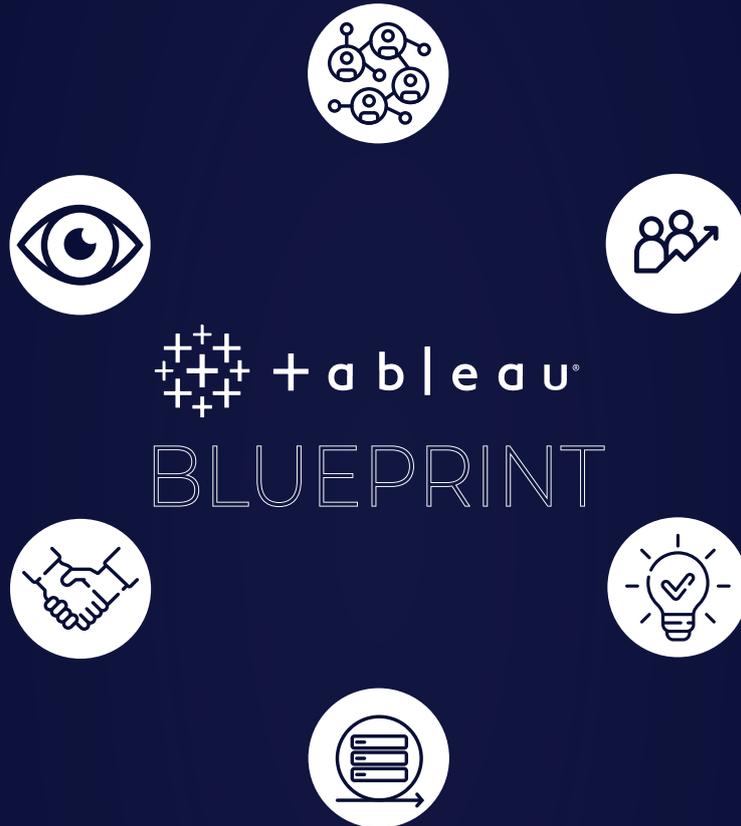
# Community

The final route is **Community**; groups of users in an organization who use data to share, collaborate and learn from others, with particular emphasis on driving user growth.

1. Communications: establishing regular internal communications to support people in the learning process.
2. Engagement: reinforcing the vision by organizing user groups and activities to promote the use of Tableau.
3. Support: putting in place an effective and efficient support system for all users.

## Chapter 2

# 6 REASONS WHY ORGANIZATIONS SHOULD PUT TABLEAU BLUEPRINT IN PLACE



## BECOME DATA-DRIVEN WITH TABLEAU BLUEPRINT

Tableau Blueprint is your subway journey to becoming a data-driven organization, with station stops along the way to provide you the capabilities to reach the goal of self-service analytics. In the first part of our Tableau Blueprint mini guide, I introduced you to the framework itself but now you may be wondering “why should I put Tableau Blueprint in place within my organization?”. This section will give you the six reasons Tableau Blueprint is THE methodology to follow to become data-driven.

## **WHY TABLEAU BLUEPRINT IS WHAT YOU'VE BEEN LOOKING FOR**

Taking the Tableau Blueprint subway not only will lead you on the path to become data-driven but also bring numerous advantages to your organization. Here we've focused on the six main reasons this framework is destined for you and your organization:

### **PROVIDES A VISION**

Probably one of the more obvious reasons but Tableau Blueprint provides a road map to guide you in the right direction to becoming a data-driven organization. It provides you a step-by-step approach with guidelines to follow, proven practices and gives you a vision for your organization's analytics. By following this road map, your whole organization can be reassured that they've got everything in place in order to achieve the end goal.

### **ESTABLISHES A DATA CULTURE**

In order to become data-driven, establishing a data culture should be one of the top priorities. According to Tableau, "A Data Culture is the collective behaviors and beliefs of people who value, practice, and encourage the use of data to improve decision-making." By following the Tableau Blueprint Proficiency route, it helps achieve just that; educating all employees to shift the way they make decisions (i.e. by using data rather than gut decisions).

### **INCREASES USER ADOPTION**

Tableau Blueprint is an organization-wide initiative and it's important that all users are data literate and have confidence in building, monitoring, and analyzing their own analytics. Through the Proficiency route, users will be educated through different learning plans to help build knowledge. Once users are confident in using and trusting analytics, user adoption should only get better.

## CHAPTER 2: 6 REASONS WHY ORGANIZATIONS SHOULD PUT TABLEAU BLUEPRINT IN PLACE

### BUILDS TRUST AND CONFIDENCE

Users will not just be consuming analytics but also be able to conduct their own analysis thanks to the ensemble of the different station stops on the Blueprint subway. Through building agility, proficiency, and a community where data is tested, users are educated and people share insights, all this combined together will increase trust and confidence in an organization's analytics.

### ALLOWS FOR AGILITY

Given analytics is ever-changing, having repeatable processes for all deployments is essential for Tableau Blueprint to be successful. Governance makes self-service possible in a way that every user in an organization can easily understand, access, and maintain data, and publish their own content without needing to wait for help from the IT department for instance.

### PRESENTS NEW BUSINESS OPPORTUNITIES

Having trusted and governed analytics where BI and Analytics professionals can make business decisions based on figures and not instinct is what will help you discover new opportunities for your organization.

## READY TO PUT TABLEAU BLUEPRINT IN PLACE?

For Tableau Blueprint to be successful in driving your organization to be data-driven, every single element of the framework needs to be put in place. Deployments must be agile, users are to be educated and insights should be shared and communicated throughout your organization. However, implementing governance at scale is a real challenge. You need agile governance solutions to be able to repeat operations, monitor results and certify the contents.

If you're wondering where to start and what solutions are available to scale your Tableau governance and become truly data-driven, continue to the next chapter of this guide of our Tableau Blueprint series.

## Chapter 3

# ENABLING THE TABLEAU BLUEPRINT FRAMEWORK WITH WIIISDOM OPS



## ENABLE TABLEAU BLUEPRINT WITH WIIISDOM OPS

If you believe in data-driven organizations, governance or you're convinced that Tableau Blueprint is the only way to scale your Tableau deployment, you might now be facing the challenge of actually implementing repeatable processes within your organization. The solution? Wiiisdom Ops. Here at Wiiisdom, we are **Tableau Blueprint enablers** providing you and your whole organization the keys to successful analytics.

Without a doubt, implementing governance at scale is a real challenge because technology and people become allies. It raises questions such as: How do you make sure that your new dashboards are deployed successfully? How can users be sure a change on their dashboard hasn't impacted all of the others? How do you measure and ensure user adoption?

Fortunately, Wiiisdom Ops is an agile solution that removes these questions of doubt and enables you to automate your Tableau testing to ensure trusted analytics at all times. With our solution, you can enable Tableau Blueprint successfully to achieve the goal of being a data-driven organization.

## **WIIISDOM OPS AND THE RIDE TO AGILITY**

The first path on the Tableau Blueprint subway is towards Agility with the aim of creating a stable, secure, and trusted environment for users through a combination of controls, roles, and repeatable processes, in other words, governance. Tableau users manipulate data through formatting, filtering, and calculation, but when creating dashboards how can users be reassured that the data can be trusted? It is actually impossible without testing and certifying content and data. Through Deployment, Monitoring, and Maintenance under the Tableau Blueprint's trusted and governed umbrella, organizations can be assured that their data is governed and verified.

So, how can Wiiisdom Ops help you on these three station stops? Let me explain:

### **DEPLOYMENT**

Quality in analytics is a must-have when making business-critical decisions based on data. At this station stop, validating data against expected results is key in ensuring trusted analytics.

When deploying new dashboards or recently updated/improved ones to your server, you need to ensure that everything is working as expected, whether that be about performance, layout, navigation, or data. The deployment must be automated and governed so that there are no issues in production. CI/CD principles focus on automating the lifecycle of development, and, applied to Analytics and Tableau, focuses on testing your dashboards before delivering them to your users. In other words, you develop your dashboard, you test it against expected results such as data retrieval and response time, then if the test is a success, you deploy it in production and if not, you fix it and you test it again. Doing this will ensure that you certify all dashboards before they get delivered to users.

Note that governance is also very important at the Tableau Datasource level and this is also something Wiiisdom Ops can help you govern.

### **MONITORING**

There can be many things to monitor within a Tableau environment with the added risk of not having enough time to monitor them all. This is also often done manually and so can be very error-prone. With Wiiisdom Ops, you can set up automated testing to monitor your Tableau dashboards in Production, where it really matters the most. Even better, any testing can be scheduled so you can literally (in the words of Tableau) "set it and forget it".

At this station stop, we'd recommend carrying out these types of testing:

## CHAPTER 3: ENABLING THE TABLEAU BLUEPRINT FRAMEWORK WITH WIIISDOM OPS

### FUNCTIONAL TESTING

Functional testing allows you to simulate user journeys, clicks and any interactions users do on a dashboard. This can vary from simulating users logging in to Tableau to them clicking on a filter within a dashboard. In essence, this testing ensures users can consume and interact with their data easily. Functional testing will allow dashboard developers to find any errors before the users do and thus improve the user experience.

#### Functionnal Testing For Your Tableau Dashboard

### PERFORMANCE TESTING

Testing the performance of your Tableau environment is equally important to measure the response time against SLA requirements and drive load to your Tableau Server. By automating this type of testing, it will allow you to determine capacity needs for future upgrades and new Tableau releases. Doing this will reassure users that the Tableau environment will continue to perform as normal.

Wiiisdom Ops can also test content performance where it will test how long it takes to open a visualization, how to long it takes to apply a filter, and the time it takes for the data to appear after applying that mark.

#### Performance Testing For Your Tableau Dashboard

### MAINTENANCE

The Maintenance station stop is very much linked to the Monitoring stop because any maintenance tasks will come from the results of monitoring tests carried out. Here we recommend carrying out:

### REGRESSION TESTING

Regression testing is particularly useful during Tableau upgrades because it makes sure dashboards always look great and display accurate data. This testing compares the before and after to keep track of changes in data, metadata, and images on your Tableau Views after an upgrade. Regression testing also validates the data, the look and feel of a dashboard plus corporate standards such as logos and colors.

#### Regression Testing For Your Tableau Dashboards

**Carrying out these different types of testing within the Tableau Blueprint framework will allow your organization to be agile, which is one out of the three workstreams into becoming data-driven.**

## YOUR FINAL DESTINATION AWAITS

Implementing Wiiisdom Ops in your Tableau Blueprint journey will bring agility to your organization and that one step closer to becoming data-driven. Equally, being able to certify and test dashboards before they reach users leads to one very important thing: analytics trust. Analytics trust is vital to be able to trust any business decisions you make.

## Chapter 4

# ALL YOUR TABLEAU BLUEPRINT RESOURCES IN ONE PLACE



## WE'VE GOT YOU COVERED

If you're at the stage where putting in place Tableau Blueprint is the next project for your organization, you'll most likely be researching resources that will advise and help you kick start the project. Well, today's your lucky day — the last part of this guide gathers all the important and useful resources on Tableau Blueprint from tools, recommendations, and blog articles to make sure you have everything you need to become data-driven.

# YOU CAN NEVER HAVE TOO MANY TABLEAU BLUEPRINT RESOURCES

## TABLEAU CONTENT

What better way to start than Tableau's website itself to learn about this framework:

### **Complete Guide: Meet Tableau Blueprint**

Let Tableau introduce and explain to you its framework for organizations to become data-driven:

- **Core Capabilities of Data-Driven Organizations**  
Read about the three core capabilities found in any data-driven organization: agility, proficiency, and community.
- **Governed and Trusted Data**  
Tableau defines governance and explains the benefits of having governed and trusted data across your organization.
- **A Repeatable Process for Tableau Blueprint**  
Discover the four-step repeatable process for Tableau Blueprint to work successfully.
- **Tableau Data and Content Governance**  
Access the Data and Content Governance Models worksheet that walks you through the key considerations for defining centralized, delegated, and self-governing models.
- **Tableau Upgrade Planning and Process Checklist**  
Upgrading your Tableau platforms requires efficient planning so Tableau has created a checklist so you can successfully execute any Tableau upgrade.
- By the way, we created a **checklist of 8 things to test** for a successful Tableau upgrade.
- **Executive Sponsor Roles and Responsibilities**  
Tableau explains the importance of identifying executive sponsors to lead the vision of modern analytics within an organization.
- **Tableau Project Team Roles and Responsibilities**  
Discover what roles and responsibilities you should put in place when implementing Tableau Blueprint.
- **Tableau Governance**  
Tableau explains why governance is at the heart of Tableau Blueprint and the importance of it in order to make self-service analytics possible.
- **Tableau Maintenance**  
Discover the recommended maintenance activities needed to be put in place on your Tableau platform.

### **Video: Rocky Mountain Tableau User Group 2021**

Watch Jeremy Blaney, Tableau Blueprint Director, discussing this framework at a recent virtual user group.

### **Rocky Mountain Tableau User Group - April 23, 2021**

### **Video Tableau Blueprint: The Hammer and Nail Edition**

Michael Cox, Solutions Director, at Tableau describes the Blueprint principles and how to concretely apply them in a development phase.

### **Tableau Blueprint: The Hammer and Nail Edition**

#### White Paper: **Establishing A Data Culture**

Tableau explains the importance of a data culture within an organization; an important part of the Tableau Blueprint framework.

## THIRD-PARTY RESOURCES

Learn even more about Tableau Blueprint from organizations that can help and advise you:

### WIIISDOM RESOURCES

#### **What is Tableau Blueprint?**

In this blog, we explain the concept of Tableau Blueprint and what every step on the subway route entails.

#### **6 Reasons Why Organizations Should Put Tableau Blueprint In Place**

Discover the main reasons why organizations should put in place the Tableau Blueprint methodology from Wiiisdom.

#### **Enabling The Tableau Blueprint Framework With Wiiisdom Ops**

Learn how Wiiisdom Ops can help you enable Tableau Blueprint and implement repeatable processes within your organization to successfully become data-driven.

### THIRD-PARTY CONTENT

#### **How can I use Tableau Blueprint?**

Massive Insights and Vivek Nankissoor explain each step of the Tableau Blueprint framework and answer the question on how to use the Tableau Blueprint.

#### **Follow The Tableau Blueprint: Five Red Flag Practices To Avoid**

Read the five red flags to avoid when it comes to using Tableau according to Benjamin Du at InterWorks.

#### **How to Harness the Power of Your Data with Tableau Blueprint**

Onebridge provides a beginner's guide to Tableau Blueprint so you can scale the use of data within your organization.

### **Video: Tableau Blueprint Series**

Biztory created a mini-series of short descriptive videos on the Tableau Blueprint covering topics such as user surveys, Blueprint Assessment, and Practical tasks examples.

### **Tableau Blueprint / What is the Tableau Blueprint?**

#### **Ebook: A Practitioner Guide to Tableau Blueprint**

USEReady, a leader in educating users on analytics best practices, has created a guide providing detailed explanations of every part of the methodology.

## TOOLS

Last but not least, we thought that these tools/solutions will be helpful in your journey on the Blueprint subway.

## TABLEAU TOOLS

### **Tableau Blueprint Planner**

Tableau created a specific Blueprint planner that will help you to gather all the information needed to successfully put the methodology into practice.

### **Tableau Server Management**

When running large deployments, Tableau Server Management becomes critical to better manage servers and optimize workloads.

### **Tableau Catalog**

Tableau Catalog gives you a complete overview of the data and how it is connected to the analytics in your Tableau environment, increasing data trust and visibility.

### **Tableau Prep Conductor**

The Tableau Prep Conductor allows you to publish, run and schedule flows in your server environment so that the data is always prepared and ready for analysis.

### **Tableau Content Migration Tool**

Use the Tableau Content Migration Tool to manage content movement between projects, sites, or Tableau Server environments.

## THIRD-PARTY TOOLS

### **Wiiisdom Ops**

Wiiisdom Ops is an agile governance solution that allows you to enable Tableau Blueprint through automated testing of your Tableau dashboards.

### **DashboardUsage 2.0 for AppsforTableau**

This tool can help you with the Measurement stop of the Blueprint subway. It can measure what's happening on your favorite dashboards such as events, client information, and even extension usage.

# THE BALL'S IN YOUR COURT NOW

And that's a wrap! You now have all the resources you need to understand and put in place Tableau Blueprint to become a data-driven organization. Remember that this framework will allow you to scale your Tableau deployment and most importantly provide analytics trust with your organization. Trust in analytics is essential to be able to make reliable business decisions. If you have any questions or are ready to start your journey to be data-driven, get in contact with us today.

Wiiisdom provides modern Analytics Governance solutions that test the data accessible in different BI reports and dashboards, measure cost and user adoption by department or project, and automate operations in order to maximize the potential of data analytics for its customers.

Visit

[www.wiiisdom.com](http://www.wiiisdom.com)

Making trusted decisions, together.



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