TABLEAU
CONFERENCE
Welcome
Windstream | Tableau Brings Sales and Marketing Together

Kelsey Robb
Principal, Marketing Strategy
Windstream Enterprise
Mind of an Engineer
Eye of an Artist
Heart of an Entrepreneur

Data visualization, development, and deployment SME

Kelsey Robb
Principal – Marketing Strategy
Windstream Enterprise

Corporate Approved:

Kelsey’s Version:

Board games are amazing.
Always looking for book rec’s.
Adventuring is always worth it.

Plaid counts as work clothes.
Business Question: How do we bring together Sales and Marketing to effectively launch campaigns?

- “Everyone is busy.”
- “We don’t trust the data.”
- “We don’t need help.”

Answer: Build Sales-enabled campaign leveraging Tableau to deliver insights, deliverables, and drive action.
The Campaign.

• Sales reps choose who to opt in for a specific multitouch blitz campaign.
• Goals by rep, director, market, and region.

The Data Challenge.

• Combine disparate data sources
• Prove relevance for individuals to executives
• Build trust in the data
“Everyone is Busy.”
“Everyone is Busy”

- Leverage preattentive attributes and efficient design
  - Focus audience attention
  - Drive value by showing quick insight
  - Management can quickly see team’s progress and engagement
- Focused approach
  - Of all the possible follow up actions, show Sales who to contact next
  - Let data drive the decision of what to do Monday morning
- Automate reports
  - Saved ~1800 (wo)man hours in 2018
Business Question: How do we bring together Sales and Marketing to effectively launch campaigns?

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Answer: Build Sales-enabled campaign leveraging Tableau to deliver insights, deliverables, and drive action.
“We don’t trust the data.”
“We Don’t Trust the Data”

• Provide a details tab for raw (ish) data
  • As confidence grows, need for this tab decreases
  • Tip: Start any training session with “the raw data is still available to you”

• Sustainable and reliable
  • Daily extract and subscriptions – users get daily reminder the data is there
  • Tip: show on front screen when the data was last updated

• Open the conversation
  • Set up time to review line by line if necessary

• Combine disparate data sources systematically

• Create exception reporting

• Drill down and through capabilities builds trust

We don’t trust the data...
Business Question: How do we bring together Sales and Marketing to effectively launch campaigns?

- “Everyone is busy.” Design for ease of use to save time and energy
- “We don’t trust the data.” Open gates to raw data and conversation
- “We don’t need help.”

Answer: Build Sales-enabled campaign leveraging Tableau to deliver insights, deliverables, and drive action.
“We don’t need help.”
“We Don’t Need Help”

• Develop common language
  • Move away from different definitions and vernacular
  • Show definitions on dashboard to create visibility

• Establish goals across organization
  • Dashboard becomes single source of measurement to target

• Drive more effective communication
  • Speak to same data and definition available
Agenda / Problem Statement

Business Question: How do we bring together Sales and Marketing to effectively launch campaigns?

- “Everyone is busy.”
- “We don’t trust the data.”
- “We don’t need help.”

Design for ease of use to save time and energy
Open gates to raw data and conversation
Common language and goals

Answer: Build Sales-enabled campaign leveraging Tableau to deliver insights, deliverables, and drive action.
By creating a single source of truth with actionable data, the Sales Enablement dashboard saved time/energy/effort while increasing engagement across the organization.
Please complete the session survey from the Session Details screen in your TC18 app.
Thank you!

Kelsey.Robb@gmail.com
LinkedIn.com/robbkelsey
Agenda

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Slide Title

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Main topic 3:
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Slide Title (2 Column layout)

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• **Main topic 3:**
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  - Subtopic copy goes here
Use white text in the negative space of full-bleed photos where necessary.

In areas of a photo where text isn’t legible, use a colored shape at full opacity or with a transparency of 5-15%.
Sample Code

```javascript
var pd = require('pretty-data').pd;

var xml_pp = pd.xml(data);

var xml_min = pd.xmlmin(data [,true]);

var json_pp = pd.json(data);

var json_min = pd.jsonmin(data);

var css_pp = pd.css(data);

var css_min = pd.cssmin(data [, true]);

var sql_pp = pd.sql(data);

var sql_min = pd.sqlmin(data);
```
Sample Code

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var sql_min = pd.sqlmin(data);
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Click to add quote

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Title, Org
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Curabitur fermentum lacinia lectus non laoreet. Sed volutpat, dui eu rutrum volutpat, nulla mi accumsan dui, non venenatis mauris augue nec lectus.
Apply the template to an existing PowerPoint presentation (that uses a different template)

1. Save this template to your Desktop.
2. Open an existing PowerPoint you wish to update.
3. Click Design, then scroll down and select "Browse for Themes."
4. Browse to the TC17 template file (.potx) you saved to your Desktop and click Open.
5. The template should update the design and font.
Type and background combinations must meet a minimum \textbf{4.5:1 contrast ratio or greater} for accessibility and large format screen legibility. Examples above demonstrate correct color use for on-screen applications.
Typography

Fonts
• This template has been formatted with Arial (bold) and Arial which are standard fonts set in the Slide Master to avoid compatibility issues.

Slide Titles and Headers
• Slide Title and Header text should be set in Arial (bold) have each word capitalized
• Main topics and Headers should be set at 32pt when possible, use colored text for visual differentiation/focus.

Body Copy
• Body copy should be set to Arial 24pt when possible.
• Try to limit each slide to a maximum of 3 font sizes.

Type Tips
• Create visual differentiation/focus by using scale and color versus using bullets.
To view the grid and guidelines, check the Guides box in the Show section under the view tab.

To further aid in alignment of objects, click the expand icon in the bottom-right corner of the Show section and check ‘Display smart guides when shapes are aligned.’
These icons are provided so you can use them to for diagrams showing architecture, workflow, etc. Icon colors can be modified by right-clicking item and selecting theme color.
<table>
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<tr>
<th>Header 1</th>
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<tbody>
<tr>
<td>To modify table, <strong>first click anywhere</strong> in table, so the <strong>Table Tools</strong> menu is highlighted at top</td>
<td><strong>Layout &gt;</strong> Shrink or expand column widths by adjusting the <strong>Cell Size</strong>, or set them to same size with <strong>Distribute</strong></td>
</tr>
<tr>
<td><strong>To modify the table layout, click</strong> <strong>Table Tools &gt; Layout</strong></td>
<td><strong>Layout &gt;</strong> Use <strong>Alignment</strong> settings to adjust <strong>text alignment</strong> and <strong>cell margins</strong></td>
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<td>To modify the table style, click <strong>Table Tools &gt; Design</strong></td>
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<td><strong>Layout &gt;</strong> <strong>To add rows</strong>, click into cell and choose, <strong>Insert Above</strong> or <strong>Insert Below</strong></td>
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<tr>
<td><strong>Layout &gt;</strong> <strong>To add columns</strong>, click into cell and choose <strong>Insert Left</strong> or <strong>Insert Right</strong></td>
<td><strong>Tip:</strong> To quickly add a row, place cursor in this <strong>last cell</strong> and hit <strong>Tab</strong> key</td>
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## Sample Table (Option A)

<table>
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## Sample Table (Option B)

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Thank you!

Contact or CTA info goes here
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