Welcome
Dashboard Cerberus: How Your Data Speaks to Three Audiences

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Tableau
My Story
See the Results?
I’ll create the ONE dashboard to be the source of truth!
Goal: Organizations Want to Move the Needle on a Key Metric

Sales orgs are trying to hit quotas
Engineering orgs are trying to minimize bugs/errors
The ONE Dashboard

The good
  A single source of truth
  Everyone knows where to look

The bad
  Too much detail for execs, and people outside the organization.
  Not enough detail for people trying to do the work
I’ll create the ONE data source of truth. Then I’ll create views for different audiences to meet their needs.
Agenda

The three audiences for your data

Building the right views for each audience

Taking advantage of all of Tableau to present your data
Audiences for a Key Metric

High level
Who: Organization heads, and people outside your organization
What: Is the number “good”? Are we on track?

Mid level
Who: Managers
What: How does my team contribute to the metric? Where should we focus our effort?

Low level
Who: The people doing the work
What: Detail to make progress on a specific task/project
Engineering Example: Error Rate

High level
   Who: Head of engineering
   What: Is the error rate below our target?

Mid level
   Who: Managers
   What: What’s the error rate in my area

Low level
   Who: Engineers
   What: Log information about an error, all occurrences, related errors, etc.
Sales Example: Quota

High level
Who: Head of sales, people outside the sales org
What: Are we going to hit quota?

Mid level
Who: Managers
What: How is my team doing against our quota

Low level
Who: Sales people
What: Customer account information, history, communication notes, etc.
High Level View: Are Things on Track?

Design considerations
- Viewed in an email or a projector
- Big, legible, text (put it up in a conference room and sit in the back)
- Keep it simple – just a few charts
- Add meaningful labels

Test it!
- Ask someone in another part of the company to tell you what the chart shows.
- Does that person think the metric(s) is on track? Can they explain what they see?
Mid Level View: How’s My Team Doing?

Design considerations

- Viewed on a laptop
- How do the parts add up to the whole
- Is there anything falling through the cracks? (e.g. a bug that’s not on a team)

Test it!

- Show this to a manager and ask how their team is doing.
- What’s missing? What isn’t needed?
Task Level View:
Get Specific, Get the Job Done

Design considerations

Viewed on a laptop or a desktop
What information does someone need to move this forward

Test it!

Show this to someone working on moving something forward. Does it help?
What other resources do people use to move this forward? Can you link to it? Provide more context?
Show Me!
Supercharge Your Data

**Mobile Views**
Make your data accessible on the go

**Customized Views**
Save the filter states you use over and over again

**Alerts**
Get an email when something interesting happens

**Subscriptions**
Get data in your inbox to start your day

**Comments**
Discuss what you see, and share your findings
Show Me!
Multiple Views Makes It Easier!

Asking one view of the data to do everything is asking too much!

Creating views for different audiences makes it easy to meet people where they are.

Tableau offers a lot to bring data into the conversation.

Try something, show it to someone, incorporate feedback.
Please complete the session survey from the Session Details screen in your TC18 app.
Thank you!

Contact or CTA info goes here
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