WELCOME
Like a Virus... But in a Good Way!

Making Tableau Adoption Infectious

Megan Peterson
Director of Analytics
Booyah Advertising
MEGAN PETERSON
a.k.a. - Meganerd

The Marvel Cinematic Universe, Of course.

Second Grade Meg

Tableau User Conference - 2015
110+ Clients in our DB
500+ Active Workbooks
70+ Datasources
80+ Employees
AGENDA

- Identifying the problem

- Natural Resistance: Battling Organizational Headwinds

- Patient(s) Zero: Agents of Change

- Infecting the masses: Making an impact

- Status: Pandemic - End Results
WHAT’S THE PROBLEM?
“Reports are unnecessarily detailed, tedious – takes too long! Beasts of data!

2015 Booyah Company Survey Responses
“I have no time to analyze the data I’m pulling. I’m burnt out!”

2015 Booyah Company Survey Responses
“Reports take so long to pull - Not enough time to do the actual work – would like to focus more on strategy

2015 Booyah Company Survey Responses
<table>
<thead>
<tr>
<th>Week</th>
<th>Date</th>
<th>Month</th>
<th>Day</th>
<th>Status</th>
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<th>To</th>
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**Total for 2016 Q1:**

- Ave pos: 0.00
- Impr: 0
- Clicks: 0
- Cost: 0
- Conversions: 0

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**Total for 2016 Q2:**

- Ave pos: 0.00
- Impr: 0
- Clicks: 0
- Cost: 0
- Conversions: 0

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**Total for 2016 Q3:**

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- Impr: 0
- Clicks: 0
- Cost: 0
- Conversions: 0

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**Total for 2016 Q4:**

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- Impr: 0
- Clicks: 0
- Cost: 0
- Conversions: 0

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**Total for 2016:**

- Ave pos: 0.00
- Impr: 0
- Clicks: 0
- Cost: 0
- Conversions: 0

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**Total for 2017:**

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- Clicks: 0
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- Conversions: 0
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</table>
NATURAL RESISTANCE
Battling Organizational Headwinds
EXECUTIVE LEVEL

Money Matters!
• Can we offer this as a revenue driver? A Profit Center?

Time Matters!
• Saving time on reporting so we can allocate towards adding value to the account through analysis and billable time

Culture Matters!
• Alleviating the stress, tediousness, and fatigue with constant manual reporting
Client Relationships Matter!
• How can we be better than our competitors?
• What insights can we offer that are unique?

Time Matters!
• Can we take on more business with our new found time saved?

Team Attitude Matters!
• Eliminating the daily slog of manual reporting helps with the team morale
DAY – TO – DAY STAKEHOLDERS

Ease of Use Matters!
• Does this help me complete my daily tasks easier with less likelihood of mistakes and errors?

Time Matters!
• Can I spend more time on strategy and analysis and less time being bogged down by spreadsheets and tedious reports?

Skill Development Matters!
• Am I learning skills that helps grow my personal analytical skills and add value to my resume?
• Am I contributing to the agency and making a direct impact?
PATIENT(S) ZERO
Agents of Change
POWER USERS

- Who is burdened most by manual reporting?
- Who shows an interest or talent?

LEVERAGE THEM!
ENCOURAGE!
REWARD!
INCENTIVIZE!
… for the largest amount of people, provide the greatest amount of information that requires the least amount of effort.

Steve Wexler
Five-Time Tableau Zen Master & Iron Viz Champion
## MAKING AN IMPACT

Spread that virus friends.

Ready to use tools

### Campaign Pacing

<table>
<thead>
<tr>
<th>Cost</th>
<th>$0.00</th>
<th>$500.00</th>
<th>$1,000.00</th>
<th>$1,500.00</th>
<th>$2,000.00</th>
<th>$2,500.00</th>
<th>$3,000.00</th>
<th>$3,500.00</th>
<th>$4,000.00</th>
<th>$4,500.00</th>
<th>$5,000.00</th>
<th>$5,500.00</th>
<th>$6,000.00</th>
</tr>
</thead>
<tbody>
<tr>
<td>$4,549.92 Spend</td>
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</tr>
</tbody>
</table>

| % of Budget Spent | 10.28% |

### Retargeting Pacing vs Prospecting Pacing vs Promo Pacing

<table>
<thead>
<tr>
<th>Retargeting Budget</th>
<th>Prospecting Budget</th>
<th>Promo Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>$22,760</td>
<td>$6,000</td>
<td>$800</td>
</tr>
<tr>
<td>Cost</td>
<td>$2,127.44</td>
<td>$2,416.48</td>
</tr>
<tr>
<td>Budget Phase</td>
<td>43.97%</td>
<td>116.33%</td>
</tr>
<tr>
<td>Campaign Spend Needed</td>
<td>$207.42</td>
<td>$-45.00</td>
</tr>
</tbody>
</table>

**Kenshoo**

**Facebook**

**SharePoint**
WHERE TIME SPENT BY TEAM

Updated 9/12/2018 4:54:01 PM

Manager A
- Employee 6: June 2018 - 32.3%, July 2018 - 22.2%, August 2018 - 19.0%
- Employee 7: June 2018 - 58.8%, July 2018 - 61.5%, August 2018 - 50.6%

Manager B
- Employee 1: June 2018 - 81.4%, July 2018 - 82.6%, August 2018 - 80.5%
- Employee 2: June 2018 - 60.3%, July 2018 - 65.3%, August 2018 - 70.0%
- Employee 3: June 2018 - 38.0%, July 2018 - 50.4%, August 2018 - 67.1%
- Employee 4: June 2018 - 50.6%, July 2018 - 45.5%, August 2018 - 56.1%
- Employee 5: June 2018 - 35.4%, July 2018 - 52.3%, August 2018 - 73.1%

Manager C
- Employee 8: June 2018 - 19.7%, July 2018 - 23.9%, August 2018 - 20.3%
- Employee 9: June 2018 - 52.3%, July 2018 - 55.9%, August 2018 - 59.0%
- Employee 10: June 2018 - 67.7%, July 2018 - 33.2%, August 2018 - 14.2%
- Employee 11: June 2018 - 70.9%, July 2018 - 77.5%, August 2018 - 76.7%
- Employee 12: June 2018 - 30.8%, July 2018 - 70.0%, August 2018 - 73.0%
- Employee 13: June 2018 - 39.2%, July 2018 - 68.8%, August 2018 - 68.8%
- Employee 14: June 2018 - 32.1%, July 2018 - 57.9%, August 2018 - 40.9%
- Employee 15: June 2018 - 22.8%, July 2018 - 57.8%, August 2018 - 20.3%
- Employee 16: June 2018 - 31.1%, July 2018 - 59.5%, August 2018 - 20.3%
- Employee 17: June 2018 - 61.9%, July 2018 - 71.6%, August 2018 - 14.0%
- Employee 18: June 2018 - 42.2%, July 2018 - 60.2%, August 2018 - 23.8%

Manager D
- Employee 19: June 2018 - 86.4%, July 2018 - 77.4%, August 2018 - 28.9%
- Employee 20: June 2018 - 74.8%, July 2018 - 77.5%, August 2018 - 73.0%
- Employee 21: June 2018 - 22.8%, July 2018 - 49.0%, August 2018 - 72.3%
- Employee 22: June 2018 - 68.7%, July 2018 - 49.9%, August 2018 - 56.4%
- Employee 23: June 2018 - 40.9%, July 2018 - 59.9%, August 2018 - 39.4%
- Employee 24: June 2018 - 55.3%, July 2018 - 74.4%, August 2018 - 76.9%
- Employee 25: June 2018 - 69.2%, July 2018 - 47.4%, August 2018 - 47.0%
- Employee 26: June 2018 - 47.4%, July 2018 - 47.4%, August 2018 - 23.7%
- Employee 27: June 2018 - 94.6%, July 2018 - 94.6%, August 2018 - 63.4%

Manager E
- Employee 28: June 2018 - 66.2%, July 2018 - 60.6%, August 2018 - 21.5%
- Employee 29: June 2018 - 37.9%, July 2018 - 73.7%, August 2018 - 72.1%
- Employee 30: June 2018 - 40.7%, July 2018 - 39.5%, August 2018 - 36.2%
MAKING AN IMPACT

Spread that virus friends.

Time saving impacts

Automated manual weekly reports

- Ex: How am I pacing today?
  - Recreated spreadsheet reports
    - not ideal, but it’s a start!
MAKING AN IMPACT

Effective Hands-On Training!

TABLEAU TEAM TRAINING AGENDA

WEEK 1
Monday
- Intro
  - Tableau Desktop / Online
- Connecting to Datasources
- Dimensions & Measures
- Quick viz tips
  - Sorting, Keep Only
Tuesday
- Download Tableau 2018.1 for Desktop
- Grouping / Sets
Wednesday
- Filters
  - Dates / Filter Options
- Parameters
Thursday
- Formatting
- Analytics Pane
Friday
- Table Calculations & Syntax
- Aggregations

WEEK 2
Monday
- Calculated Fields – Hands On
  - Logic
  - Dates
  - Strings & Integers
Tuesday
- Template Review
- Hands-On Building
Wednesday
- Dashboards, More Building
  - Tips & Tricks
  - Layout
  - Formatting
Thursday
- Tableau Online
  - Permissions
  - Subscriptions
  - Refresh Extract Schedules
  - User Maintenance
Friday
- Replacing Data in Templates
- TABLAM!
SKI RESORT X
INTERNAL COMPETITIVE ANALYSIS

<table>
<thead>
<tr>
<th>Brand/Type</th>
<th>Report Date</th>
<th>Display URL</th>
<th>Domain</th>
<th>Impression Share</th>
<th>Avg. Position</th>
<th>Overlap Rate</th>
<th>Position Above Rate</th>
<th>Top of Page Rate</th>
<th>Outranking Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brand</td>
<td>1/1/2017 Tablets</td>
<td>bankofamerica.com</td>
<td>17.58%</td>
<td>4.2</td>
<td>25.98%</td>
<td>59.93%</td>
<td>29.53%</td>
<td>34.08%</td>
<td></td>
</tr>
<tr>
<td>Non-Brand</td>
<td>1/1/2017 Tablets</td>
<td>bestratesoffers.com</td>
<td>11.47%</td>
<td>4.8</td>
<td>20.94%</td>
<td>22.62%</td>
<td>28.24%</td>
<td>29.29%</td>
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</tr>
</tbody>
</table>
SKIN CARE BRAND Y
STATUS: PANDEMIC

End Results
Please complete the session survey from the Session Details screen in your TC18 app.
AND REMEMBER…
Thank you!

Megan Peterson
Director of Analytics, Booyah Advertising
mpeterson@booyahadvertising.com
TABLEAU CONFERENCE
# Tables

<table>
<thead>
<tr>
<th>Header 1</th>
<th>Header 2</th>
</tr>
</thead>
<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</strong> &gt; Shrink or expand column widths by adjusting the <strong>Cell Size</strong>, or set them to same size with <strong>Distribute</strong></td>
</tr>
</tbody>
</table>
| To modify the table layout, click **Table Tools > Layout**  
To modify the table style, click **Table Tools > Design** | **Layout** > Use **Alignment** settings to adjust text alignment and cell margins |
<p>| <strong>Layout</strong> &gt; To <strong>add rows</strong>, click into cell and choose, <strong>Insert Above</strong> or <strong>Insert Below</strong> | <strong>Tip</strong>: To quickly add a row, place cursor in this <strong>last cell</strong> and hit <strong>Tab</strong> key |
| <strong>Layout</strong> &gt; To <strong>add columns</strong>, click into cell and choose <strong>Insert Left</strong> or <strong>Insert Right</strong> |  |</p>
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</table>
Template

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.
Theme Colors

Type and background combinations must meet a minimum **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.