+++ tableau
SOFTWARE

Audience Audit Completes More Work in Half the Time with Tableau

audienceaudit™
Connect with your customers.

FOUNDED: 2009
HEADQUARTERS: CHANDLER, AZ

WWW.AUDIENCEAUDIT.COM

50%
FASTER PROJECT
COMPLETION

2/3
PROJECT COST REDUCTION

4x
REVENUE INCREASE

To make its unique research accessible to a wider range of agencies and their clients, Audience Audit wanted to lower the cost of its projects and deliver results more quickly, without deteriorating the quality of the research. Using Tableau, Audience Audit has lowered fees by up to two-thirds, reduced project timelines by 50 percent and substantially increased work capacity—all while improving profit margin, increasing customer satisfaction and driving new project sales by a factor of four.

Susan Baier, the owner of Audience Audit, had a unique product that agencies loved— but she wanted to make it accessible to a greater portion of their clients. Doing so would require shortening the timeframe and lowering the cost of her custom segmentation projects.

Audience Audit projects follow a common process: Baier designs and delivers a targeted online survey. When the results are in, the company performs statistical analysis of the data; the output is rendered in Excel.

This Excel file is the foundation from which Baier creates customer-facing presentations to communicate her findings.

"I spent, easily, 20 hours just working with the data before I could start building charts—and I'm fast with Excel! But every project is different, and you have to build every one of those little pivot tables to get the data that you need to build the chart you want."

This time-intensive, manual process had to be replicated any time there was a change to the data. "If something changed, then I had to go update everything individually!" Baier says.

After this process was complete, Baier would build her charts in presentation software, which took more time. "These are big studies, and I need to report a lot of findings to people who aren't research people—or not even marketing people, sometimes. The presentations would be hundreds of slides long because I had all this data I had to share with them," she says.

And simply outsourcing this time-intensive work wasn't an option. Susan's years of experience in marketing and business strategy are the "secret sauce" that allows her to parse out key insights in the data, and share its story with her clients. She simply has to work through the data herself, evaluating results and determining how best to show them.

"I've been doing marketing strategy for 25 years. It's not value-added for my client to have me building charts. What's value-added for my clients is the data, my interpretation of it and my assistance in helping them understand it. Building the charts is only one step in the process, but it has to happen for me to see what the data says, and for my clients to see it too."
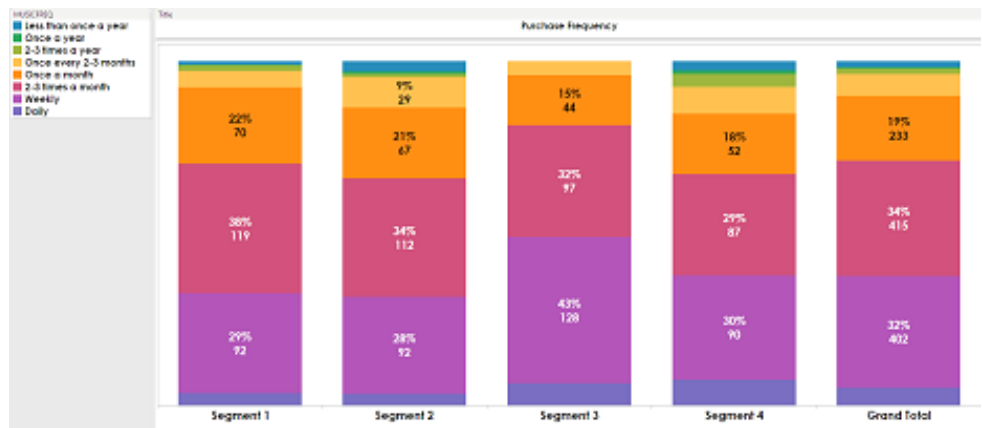
A self-described "data nerd," Baier admits that capturing her customers' attention could be challenging.

After all the investment and effort involved, expectations were high. "Clients don't want to pay thousands of dollars and see their results in an Excel file. The output has to look great."

Baier recognizes that not everyone gets as excited about market research as she does. "When I share results with clients, there are always people in the audience thinking, 'Sigh. Here we go. Two-hour market research presentation,'" Baier says, laughing. "I'm always excited about what we've found, and I try to bring that energy to the client presentation. Having visually interesting charts helps a lot."

Light Bulb Moment

Making her work more accessible to agency clients would require some major changes. "I knew what agencies could do with this data," she says. "But in order for them to use it for the majority of their clients, I had to develop a project with a lower price point, and a faster schedule."

In the spring of 2012, Baier realized she already had a tool that might help— Tableau. Baier first heard about Tableau

in the mid-2000s, and had lobbied previous employers to use it. When she opened Audience Audit, she purchased a Tableau Desktop license. Baier had played around with Tableau in a PC environment on her Mac, but hadn't had time to work with it extensively.

"I was trying to figure out how to make this major shift in the business, and all of a sudden it was like the light bulb went on—'Oh, wait a minute. I have Tableau, maybe this would help,'" she says.

She wanted to get up and running quickly, so Baier decided to ask for help. Baier had been following Michael Cristiani of Powerhouse Factories, a leading Tableau Community member, on Twitter, so she contacted him and offered to hire him to build an initial workbook.

"He was great. We went through a few rounds, and I came out with a small workbook, four or five worksheets that he built to show the data the way I wanted to show it."

Baier then tried to replicate the workbook herself. "I basically reverse-engineered it and figured out how he built it, and he was great about answering questions when I was stumped. Before I knew it I was doing stuff on my own, adapting, incorporating different views and finding new ways to explore my data."

Baier now uses Tableau exclusively for presenting my results to clients. "I hardly ever do any kind of a Keynote presentation anymore. Sometimes I have clients who want that for executives, but 90 percent of my projects just go out in Tableau."

She appreciates the ability to allow her clients to dig into their own data through using packaged workbooks and the free Tableau Reader application.

"I can add filters and give them a workbook that allows them to look at their data in different ways, export chart images for their own presentations, or download crosstabs for their own needs. Some of my clients don't want to do that, so I send them a PDF of the workbook— or if they want specific images of particular slides for their own presentations to their client, I can export those."

"I Hit That Sweet Spot"

While the advanced statistical analysis portion of Baier's services remain the same, she estimates that using Tableau allows her to complete the rest of the analytics and deliver results 90 percent faster than before.

"Since incorporating Tableau into our work, we've increased our project load by a factor of eight, our timelines have reduced by 50 percent and our revenue has increased by a factor of four, " Baier says.

"Tableau has taken a tremendous amount of time out of the process."

While Audience Audit projects are customized for each client, the surveys and results files frequently share similar formats. This has allowed Baier to create some standard visualizations.

"When I have a new project, I pull up that workbook, switch out that data source to the new one, and I'm 80 percent of the way to a completed visualization for that set of data. So that's hugely time-saving," she says.

This has allowed her to meet client needs at a speed simply not possible previously.

"For example, we have a client with a big conference coming up, and they want this data," Baier says. "We just closed down the survey and dumped the data on Monday, ran the analytics like a bat out of hell, and I'm in Tableau today— Thursday—visualizing it for the client. I'm going to be able to show that to the client a week after the survey closed. Before Tableau, there's no way we could have delivered on that deadline."

Title				Favorite Brands by Segment							
	One of my favorite brands				Have used				Heard of, haven't used			
	Segment 1	Segment 2	Segment 3	Segment 4	Segment 1	Segment 2	Segment 3	Segment 4	Segment 1	Segment 2	Segment 3	Segment 4
Brand Y	72%	77%	52%	55%	24%	23%	33%	41%	4%		14%	5%
Brand L	60%	70%	33%	41%	36%	30%	48%	41%	4%		19%	18%
Brand V	54%	48%	35%	23%	38%	44%	45%	64%	8%	7%	20%	14%
Brand P	33%	26%	24%	32%	46%	52%	62%	36%	21%	22%	14%	32%
Brand R	4%	4%	5%	10%	54%	38%	52%	33%	42%	58%	43%	57%

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S O F T W A R E

And now if there is a change to the underlying data, Baier easily makes updates through Tableau. "Now I don't have to go and change each one of those darned pivot tables!" she says. "Either there's already a calculation in Tableau to do it, or I can build one to do it automatically."

While Baier's productivity has gone up significantly, she is proud to point out that quality has gone up, too.

"My favorite part is digging into the data we've collected. With Tableau I can see things that I couldn't see before—because I didn't have the ability to look at data in all the amazing ways that Tableau has built-in," she says.

"So our work is better—in addition to being way more fun!"

Baier has saved so much time using Tableau that she has been able to make a better profit margin despite lowering her project rates.

"Since I started using Tableau, I've been able to reduce the fees on my projects by up to two-thirds with a higher margin per hour," she says.

"Once I'd tested this new process incorporating Tableau, I rebuilt my website, launched new pricing, new timelines, and we're off and running," Baier says. "I hit the sweet spot where I could give my clients exactly what they wanted at a highly competitive rate, very quickly, very efficiently, and take on more projects."

"My clients love it!"

Now that Baier is using Tableau visualizations to present her findings, she is seeing more enthusiastic client reactions.

"Inevitably, my clients love it—they love it! Honestly, if I can get clients excited about looking at research data, that's a win. Nobody does that. And it's definitely easier with Tableau than it was before," Baier says.

She attributes some of that enthusiasm to her new ability to answer customer questions on the fly. "It's not a static chart. It's linked to underlying data, so it's a conversation we can have and explore together as we go through it," she says. "That 'let me show you' part of Tableau—'Let's click on this and look at the differences.' The immediacy is great. I can watch my clients' jaws drop when they see the charts change with a click. And I simply can't do that any other way," Baier says.
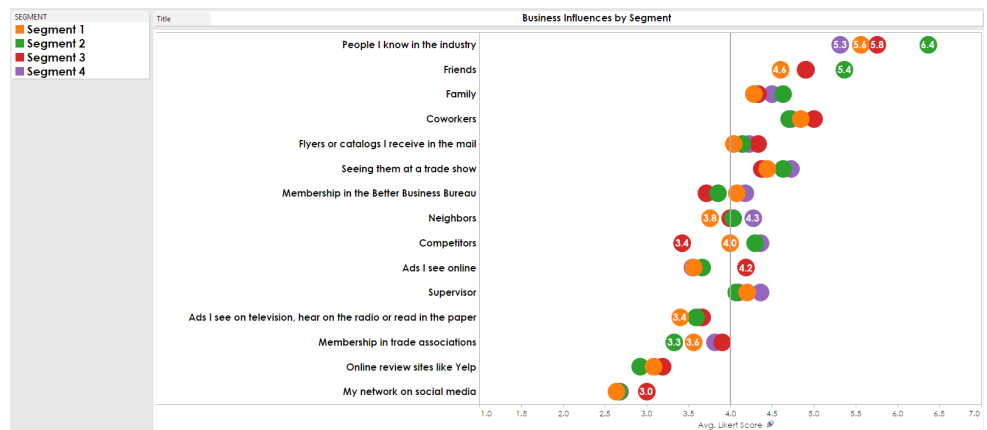
Her agency relationships have become far stronger in the year since she has implemented Tableau. "The most telling statement is that I have agencies incorporating our research into the work they sell to every client. To me, that's a huge vote of confidence. They see our work as a critical step in what they do."

"If I Didn't Have Tableau, I'd Be a Wreck."

Another, more personal, benefit for Baier is that Tableau has helped her to keep her business small while meeting her business growth goals. "Tableau has given me a way to grow dramatically without having to take on folks to do repetitive Excel work. There will come a time when

I may need to hire, but Tableau has pushed my bandwidth problem off substantially—and when I do, I can hire people who will add value and find the work as interesting as I do."

Baier can't imagine going back to her old way of doing business. "Tableau has become such a seamless part of what I do now. It really is responsible for what my business looks like today," she says. "I started incorporating Tableau in this way just a year ago, and it has transformed what I've been able to do with my business just in that year . And a Mac version on the way? I can't wait!"

She continues, "If I didn't have Tableau anymore? I'd be a wreck. And you'd have a lot of unhappy agencies —and one very unhappy husband—to answer to!"