



Get on the Fast Track with Tableau: a Starter Guide for Sales Ops



Are you ready to explore your sales data faster and deeper than ever before? Whether you're new to Tableau, or looking for additional, sales-specific resources, this guide will get you on the fast track to obtaining rich, actionable insights that will elevate your team's performance and help your organization gain a competitive edge.

This guide includes resources to get you up and running, with suggestions for where to go next after you've mastered the basics. First, it's important to understand how to use your data in Tableau. Check out our virtual trainings. Dig in to dashboards with the help of the suggested material below, or tune into a few webinars and see how easy it is to use all of your data to create meaningful sales analytics. Last, but not least, see what our very engaged community shares on Tableau Public.

Since this is a journey that other sales professionals have traveled before you, check out the success stories of other companies who use Tableau to improve sales performance. Sales teams like yours are answering their toughest business questions with Tableau, and it won't be long before you're on the path to success, too.

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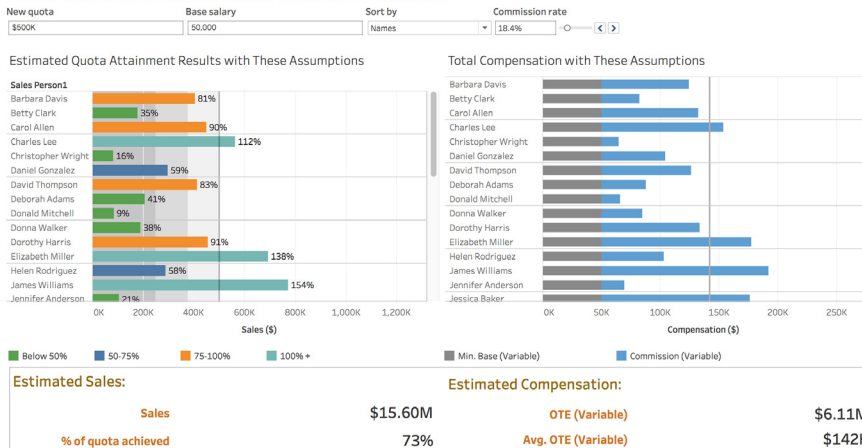
Start here: resources to understand how Tableau works

As you begin to dive in to Tableau, these how-to resources will get you on your way to becoming a data-driven team.

- Start by downloading a [two week free trial of Tableau Desktop](#). There's no credit card required, and the trial can be extended if you need more time. Don't have a data set to analyze? Tableau comes with three data sets to get you started.
- Start with our superstore data set to learn how to analyze sales trends, identify your most profitable customers, and uncover the impact of discounts. The data set comes with pre-built dashboards including a succinct executive summary, a sales rep commission model, and two ways to forecast sales. Try to pull apart and rebuild the dashboards to quickly learn how to use Tableau desktop. Soon, you'll be asking and answering questions of your data as quickly as they spring to mind.

Sales Commission Model

Enter new quota, commission rate and base salary to estimate sales and compensation



- View these free [bite-size training videos](#) to learn how to prepare, analyze, and share your data.
- Learn how to do [advanced LOD expressions in this blog post](#) with step-by-step instructions and downloadable Tableau workbooks.
- Visit [Tableau Public](#) where you'll find a gallery of more than 200 sales and marketing vizzes using public data—including analysis of [sales effectiveness](#), [supply chain volume](#), and [open pipeline opportunities](#), to name a few.
- Connect with our active [Tableau community](#) to get inspiration and support from thousands of other users. There's a [newbies forum](#) if you're just getting started.
- Ready to start analyzing your own data? Tableau comes with [Dashboard Starters](#) that will give you new ways to look at data from sources like Salesforce, Eloqua, and Marketo. Tableau also comes ready to [connect to hundreds of data sources](#), so it's easy to get started. And if you need help with something more advanced, [our partners](#) are ready to help.

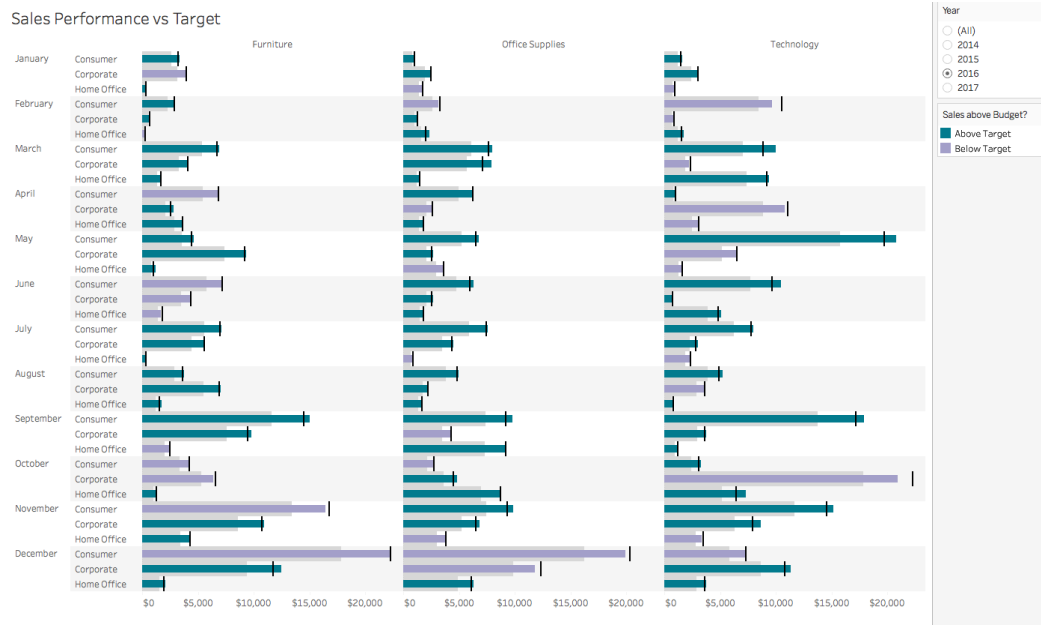
Create engaging dashboards

The golden rule of storytelling is also the golden rule of communicating with data: start with your audience. And if your audience is anyone in a sales department, you can guarantee they're in a hurry. The dashboards your teams build should be designed to communicate as clearly and as quickly as possible.

The 'Sales Performance vs Target' dashboard below is a prime example of how to do just that. The green bars show segments that hit their sales target—or as many sales teams say, “They went green.” The purple bars missed their targets. Viewers can see and understand the information almost instantaneously.

Most of the time, the information provided in a dashboard like this one will be enough to satisfy a sales executive's urgent questions. Anticipating follow up questions like “Why did that happen?” with drill-down functionality is easy and will save time in the long run. Both dashboards will succeed because you know what your audience cares about and your dashboards capture what matters to them.





The resources below will help you develop dashboards your teams will want to see and use, rich with actionable insights that leverage all of your data.

- Read [Do's and Don'ts of Dashboards](#) to learn where to start, what to include, and what to avoid. For instance, do experiment, iterate and get feedback on your dashboards and think about your audience to make it personal. On the other hand, don't overdesign or try to answer every question at once. Before-and-after dashboard comparisons help you see how to improve your own dashboards.
- Learn different techniques to help you and others understand more about your data—quickly—with our [Visual Analysis Best Practices guide](#).
- Watch this [on-demand webinar](#) to learn techniques to improve your visualizations, and what mistakes to avoid.
- Read [“Create Dashboard Layouts for Different Devices”](#) to learn how to create device-friendly dashboards with Tableau Desktop.

Clean and organize your data with Tableau Prep

Anyone who has analyzed a sales team's CRM entries knows that preparing data can be a repetitive, manual, and time-consuming process. With Tableau Prep, you can easily create joins, unions, pivots, and aggregations using simple drag-and-drop actions—no scripting necessary.

- Try [Tableau Prep](#), and discover how to shape and clean data before analysis.
- Hear from product managers in this [About Tableau Prep blog](#) detailing five ways to approach data flows in Prep.



Real world stories: Four sales ops teams achieving success with Tableau

Read how other sales organizations have achieved success with the power of data analysis and visualization using Tableau.

- [LinkedIn](#) is the world's largest professional network. They adopted Tableau, which is accessed weekly by 90 percent of their sales force, to centralize customer data, track account performance and predict churn. This created a more proactive sales cycle and increased both revenue and product use.
- [MillerCoors](#) produces popular beer brands including Miller, Coors, and Blue Moon. The company's sales team used Tableau to establish one source of truth for sales reporting. The data enables a team of more than 300 salespeople to spot opportunities in the field and sell more products.
- [Ingersoll Rand](#), an industrial manufacturing company, benefits from the value that Tableau and visual analytics delivers with valuable insights used by their sales team for local-market business planning.
- [Tableau's sales organization](#) and other business groups use the Tableau platform, too. Hear how sales staff uses data to foster greater accountability and become a team that routinely hits targets. You'll even see what dashboards they tend to use most.

Where to go from here?

There's more to explore! From online resources to in-person events, we offer several opportunities to increase your Tableau knowledge and skills.

- Bookmark the [Tableau Sales Analytics Solutions page](#), a robust, one-stop resource for all things data and sales.
- Assistance from [Tableau Support](#) is a click away. Experts are ready to answer your questions and help you do things faster and better with Tableau.
- Attend [Tableau Conference](#)! Tableau Conference (TC) brings together superfans from around the globe for a week of learning, inspiration and interaction. Read our recent [blog post](#) and find out why you should join us in New Orleans for TC18.
- Get social with us on [LinkedIn](#), [Twitter](#), [Instagram](#) and [Facebook](#).





About Tableau

Tableau helps people transform data into actionable insights. Explore with limitless visual analytics. Build dashboards and perform ad hoc analyses in just a few clicks. Share your work with anyone and make an impact on your business. From the individual analyst looking at specific sales performance to the sales executives looking at overall performance in the pipeline and ability to hit targets that meet company goals, people everywhere use Tableau to see and understand their data.