EMBEDDING TABLEAU IN SALESFORCE DASHBOARDS
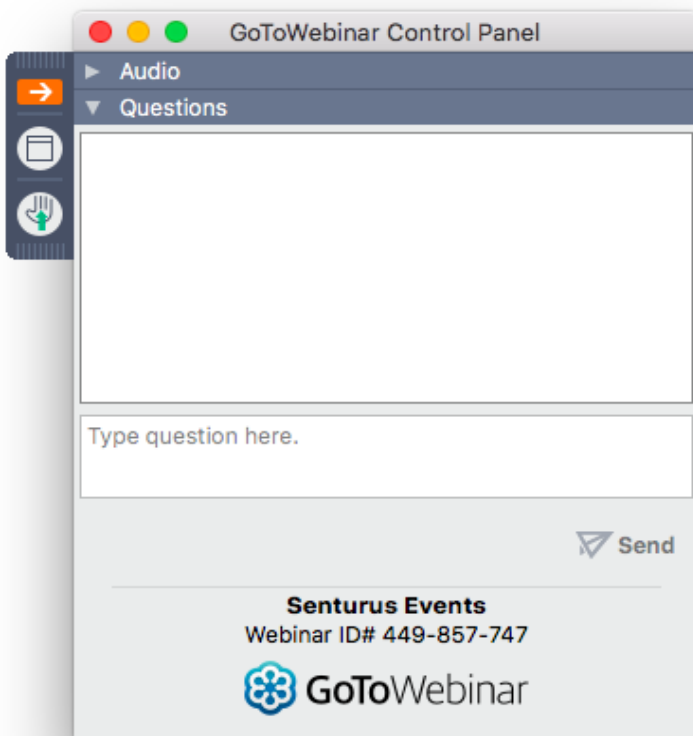## How Nutanix Is Improving Sales Operations Using Sparkler

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Presentation Slide Deck
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RESOURCE LIBRARY

Welcome to our extensive, free library of past webinars, demos, whitepapers, presentations and helpful hints. Use the topic boxes to the right to filter through and easily locate content. We are constantly adding new materials, so please check back often to see our latest content. Enjoy!

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Today's Agenda

- Introductions

- Accessing Salesforce data from Tableau

- Overview of Tableau Sparkler

- Demo

- Sparkler at Nutanix

- Summary/wrap-up

- Senturus overview

- Q&A

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Introducing...Today's Presenters

Michael Weinhauer

Practice Area Director / Solutions Architect

Senturus, Inc.

Michael Hunter

Marketing Operations Manager

Nutanix

Poll #1

How are you currently analyzing Salesforce data? (Check all that apply.)

- Standard reporting that comes with Salesforce
- Export and analyze in BI tool (Excel, Tableau, etc.)
- Data mart containing Salesforce data
- Directly connect BI tool to Salesforce cloud
- Other/not doing reporting/don't know

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Poll #2

What are your Salesforce reporting challenges? (Check all that apply.)

- The Salesforce interface is not appealing or interactive

- Absence of trending over time or ratio analysis

- Not easily actionable by sales

- Incorporating outside reports into Salesforce

- Integrating Salesforce with data from other sources

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Accessing Salesforce Data

Accessing Salesforce Data

Use Salesforce integrated reporting (no Tableau)
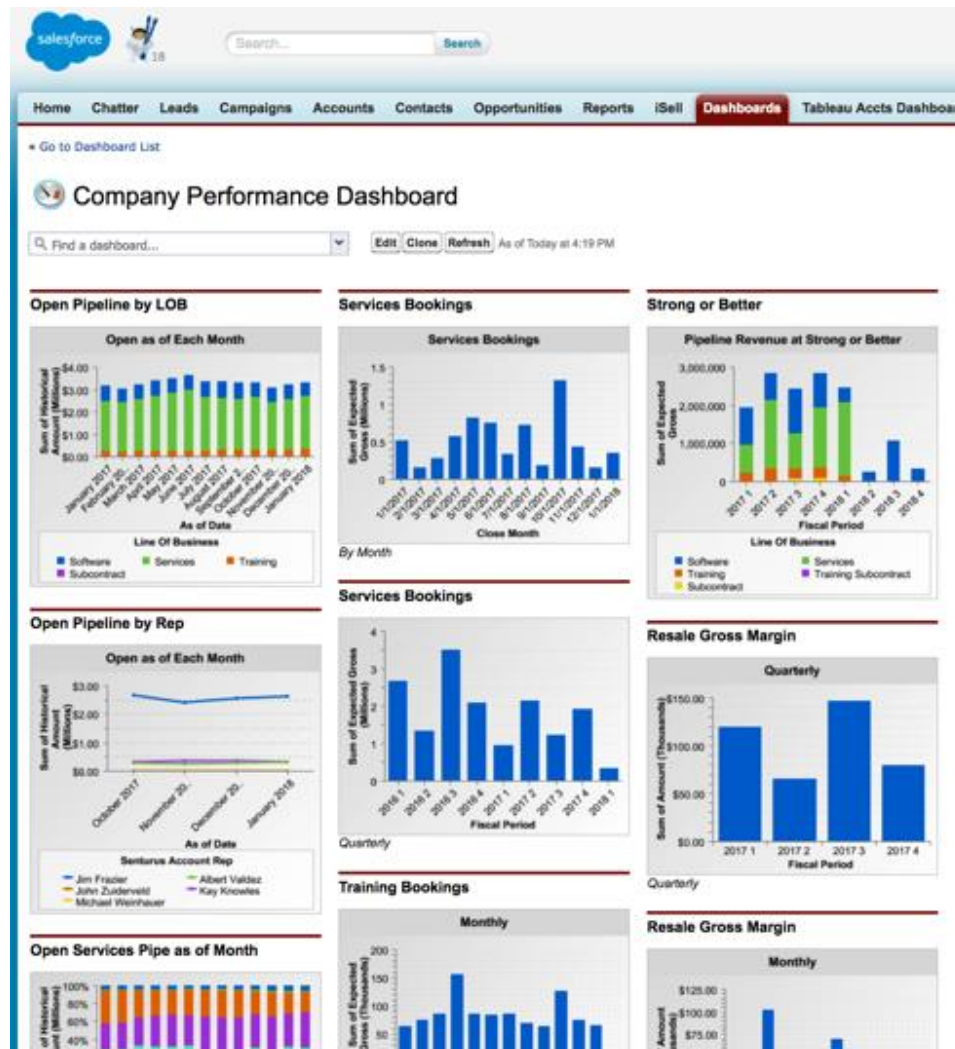
Accessing Salesforce Data from Tableau

1. Manually extract data from Salesforce into flat files, pull into Tableau
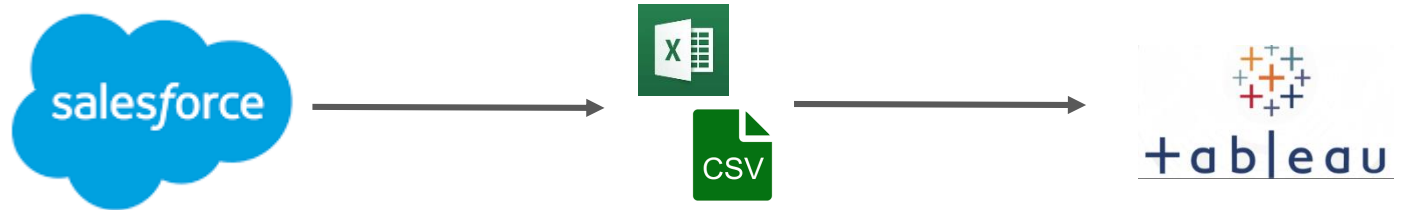
2. Utilize Tableau's direct connections to Salesforce cloud
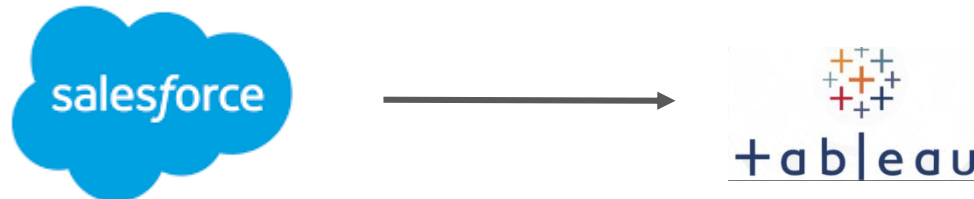
3. Connect Tableau to a replica database of Salesforce data that you control
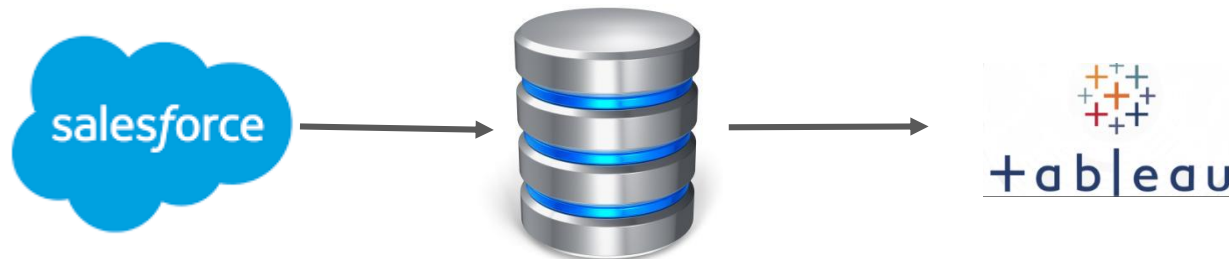
Accessing Salesforce Data from Tableau

4. Connect Tableau to an *integrated* database that you control

Integration Process/ETL

salesforce

Other Sources
e.g. ERP, marketing automation

Combined Database

tableau

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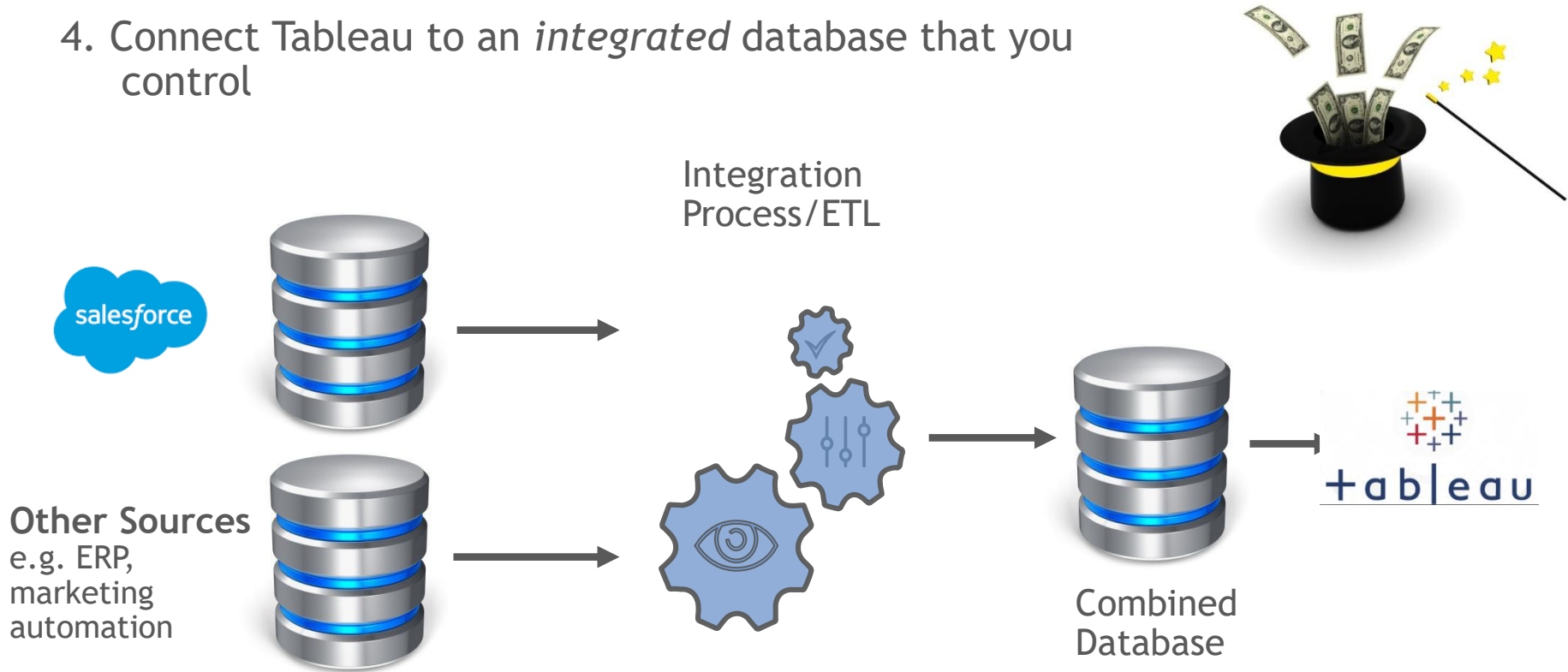
Accessing Salesforce Data from Tableau

Drill from a Tableau dashboard directly into the relevant Salesforce screen
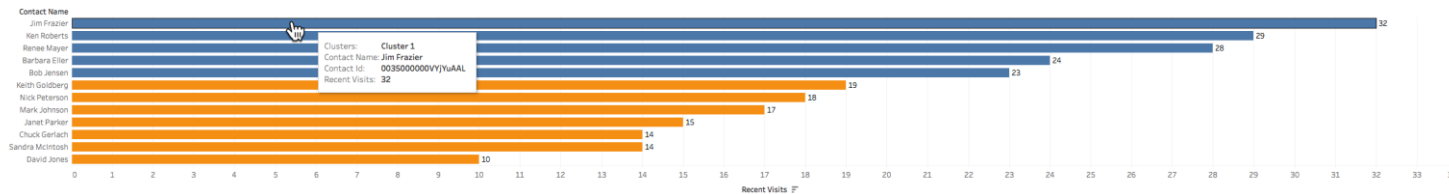
Accessing Salesforce Data from Tableau

Configure a Tableau URL action that combines your Salesforce domain with the relevant Salesforce record ID

Technique Capabilities Matrix

Capability	Tableau Actions	Tableau Direct to Salesforce	Tableau to Local Salesforce Replica Database	Tableau to Combined Database
Drill from Tableau to Salesforce Screen	◕	●	●	●
Pass Context to Salesforce from Tableau	●	●	●	●
Basic Visualizations		◔	◑	●
Blended Data		◔	◑	●
Pipeline Growth Trend			●	●
Components of Pipeline Growth			●	●

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Technique Capabilities Matrix

Capability	Tableau Actions	Tableau Direct to Salesforce	Tableau to Local Salesforce Replica Database	Tableau to Combined Database
Marketing Automation Platform-Sourced Behavior Score Growth Trend		○	◑	●
Marketing Automation Platform-Sourced Updates to Salesforce Campaign Members		◔	◔	●
Salesforce Pipeline Analysis		◑	●	●
Salesforce Marketing and Pipeline Activity		◔	●	●
Data Beyond Salesforce		○	◑	●
Advanced Analytics				●

What If You Want Both? Enter Sparkler!

Analytics in the flow of the business process, at the point of impact!

Why Sparkler?

#1: Security

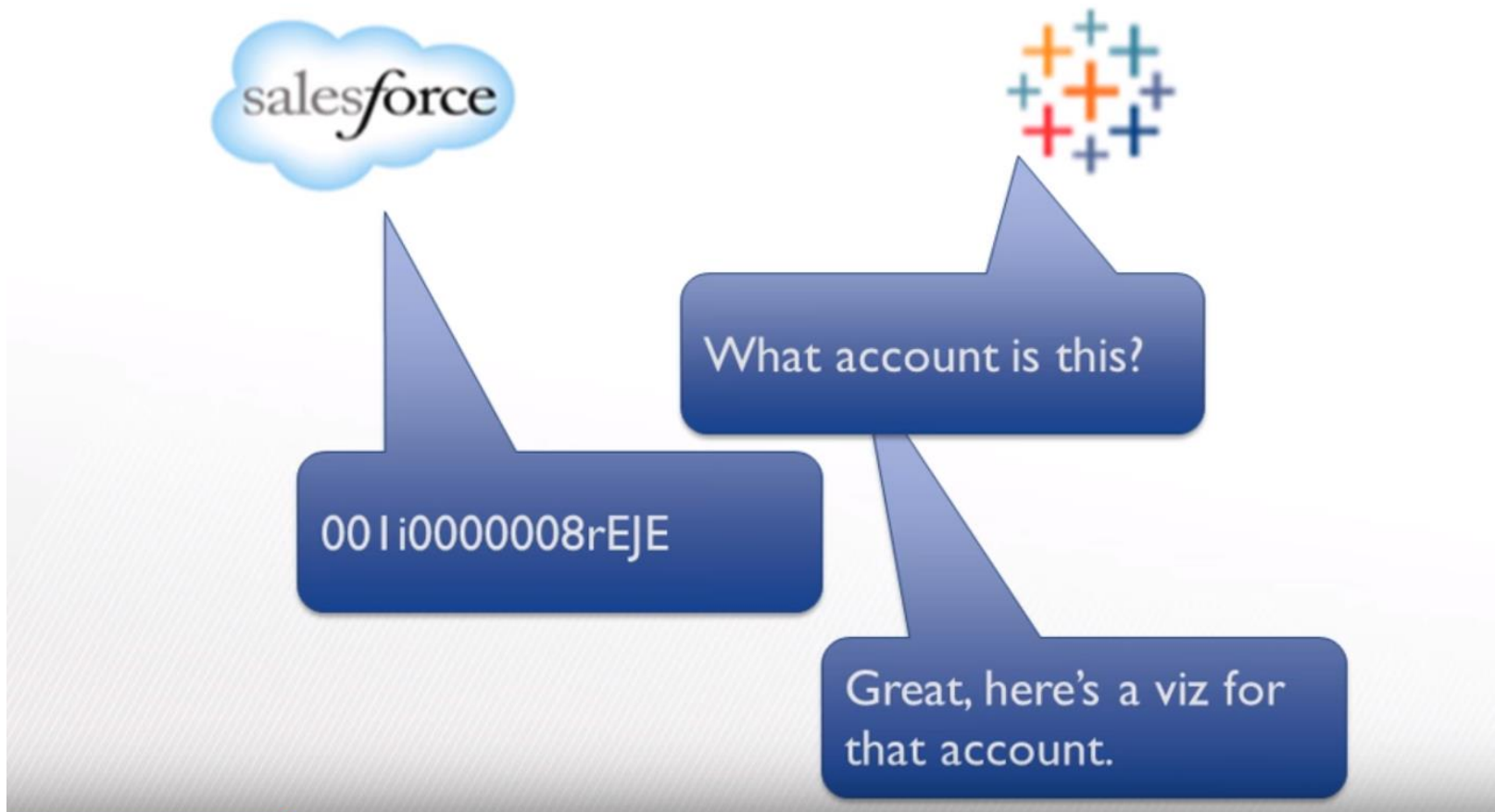Https
Message encryption

Why Sparkler?
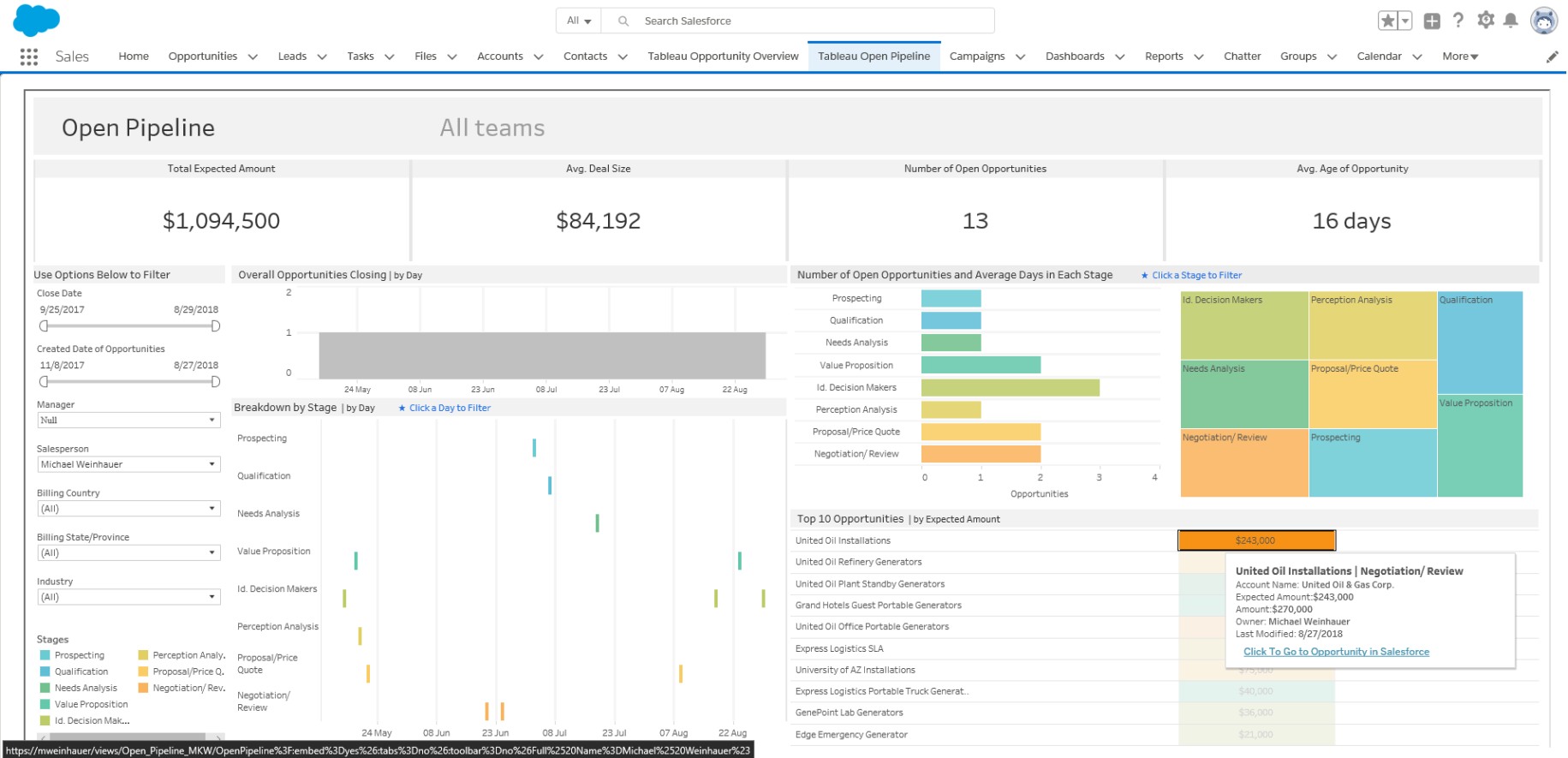
#2: Context without needing to leave Salesforce!

Why Sparkler?

#3: Data BEYOND Salesforce!

Top Level Sales View – Opportunities Dashboard (Lightning)

Opportunities Dashboard (Lightning)

Accounts Dashboard (Lightning)

DEMO

Nutanix – Overview

Nutanix provides enterprise cloud solutions

Nutanix makes IT infrastructure invisible leveraging
- Cloud software and hyperconverged solutions
- Public, private and distributed edge clouds
- One-click app management

Enabling customers to run any app at any scale with a lower total cost of ownership!

Nutanix – Improving Sales Operations

Past state
- Separate Tableau and Salesforce UI
- Poor adoption because 700+ reps don't want to leave Salesforce
- Limited Salesforce reporting handicapped efficiency

Nutanix – Improving Marketing Operations

Current state

- Implemented Tableau Sparkler to embed dashboards in Salesforce
- See Tableau visualizations without leaving Salesforce UI
  - Reference customers in real-time
  - Able to progress and close opportunities faster
- Secure, contextually-aware, visual

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Nutanix - Demo

Nutanix - Demo

Nutanix – Improving Sales Operations

Future state
- Marketing
  - Conference presenters
  - Seminar presenters
  - Advisory board speakers
- Churn propensity
- Cross-sell/upsell

Nutanix – Improving Sales Operations

Business value
- Greatly reduced time to find relevant references
- Shortened sales cycles
- Doubled adoption by sales reps
- Positive feedback from sales reps
- Increased efficiency of marketing and sales staff
- Automated

Technical benefits
- Data beyond Salesforce
- Automatic context handling
- Secure communications

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Summary

- There are many ways to access Salesforce data from Tableau, each with its own benefits and costs.

- Tableau Sparkler lets you leverage the power of Tableau visualizations without leaving Salesforce!

- Using Tableau with a combined data source allows organization to truly unlock the power of both applications!

  - Installation of Sparkler is neither straightforward nor easy, but the benefits are significant!

Want More Details?

[Embedding Tableau in Salesforce Dashboards](#)

[Use Tableau To Get To The Gold Hidden In Salesforce](#)

EMBEDDING TABLEAU IN SALESFORCE DASHBOARDS

🕐 January 16, 2018   📁 SALESFORCE REPORTING, TABLEAU

A HOW-TO PRIMER WITH DEMOS

USE TABLEAU TO GET TO THE GOLD HIDDEN IN SALESFORCE

🕐 March 01, 2018   📁 DATA PREPARATION, SALESFORCE REPORTING, TABLEAU

SECRETS TO UNEARTHING MISSING VALUABLE INDICATORS

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Senturus Can Help!

Install <u>Tableau Sparkler</u> to embed
Tableau visualizations into Salesforce

- Install Sparkler on Tomcat application server

- Configure SSL on Sparkler (Tomcat) and
  Tableau Server

- Configure trusted tickets authentication
  between Tableau Server and Sparkler

- Configure Salesforce to use the Sparkler
  application, sample Visualforce pages and tabs

- Deploy sample Tableau dashboards (accounts
  dashboard, accounts and opportunities) for use
 on Tableau Server

- **$4995**

WHO WE ARE

Business Analytics Consultants

Bridging the Gap Between Data & Decision Making

Business Needs

SENTURUS

Analysis Ready Data

DECISIONS & ACTIONS

Business Analytics Architects

- Dashboards, Reporting & Visualizations

- Data Preparation & Modern Data Warehousing

- Self-Service Business Analytics

- Salesforce Reporting

- Big Data & Advanced Analytics

- Planning & Forecasting Systems

- Proprietary Analytics Connector Software
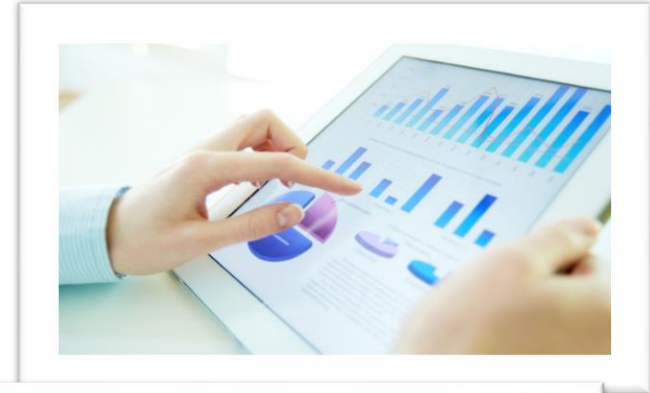
1200+ Clients, 2000+ Projects, 18+ Years

ADDITIONAL RESOURCES

Upcoming Events

senturus.com/events   norcalcognosusers.com

THE WEEKLY WIND DOWN

OUR TRAINERS SHARE THEIR FAVORITE TIPS

Every Friday - 11am PT - 30 minutes

NOR CAL COGNOS USERS GROUP MEETING

PRESENTATIONS ON COGNOS ANALYTICS 11.1

Thursday, November 8, 2018 - 10am – 2pm PT - 4 hours

Visit Our Free Resource Library and Blog

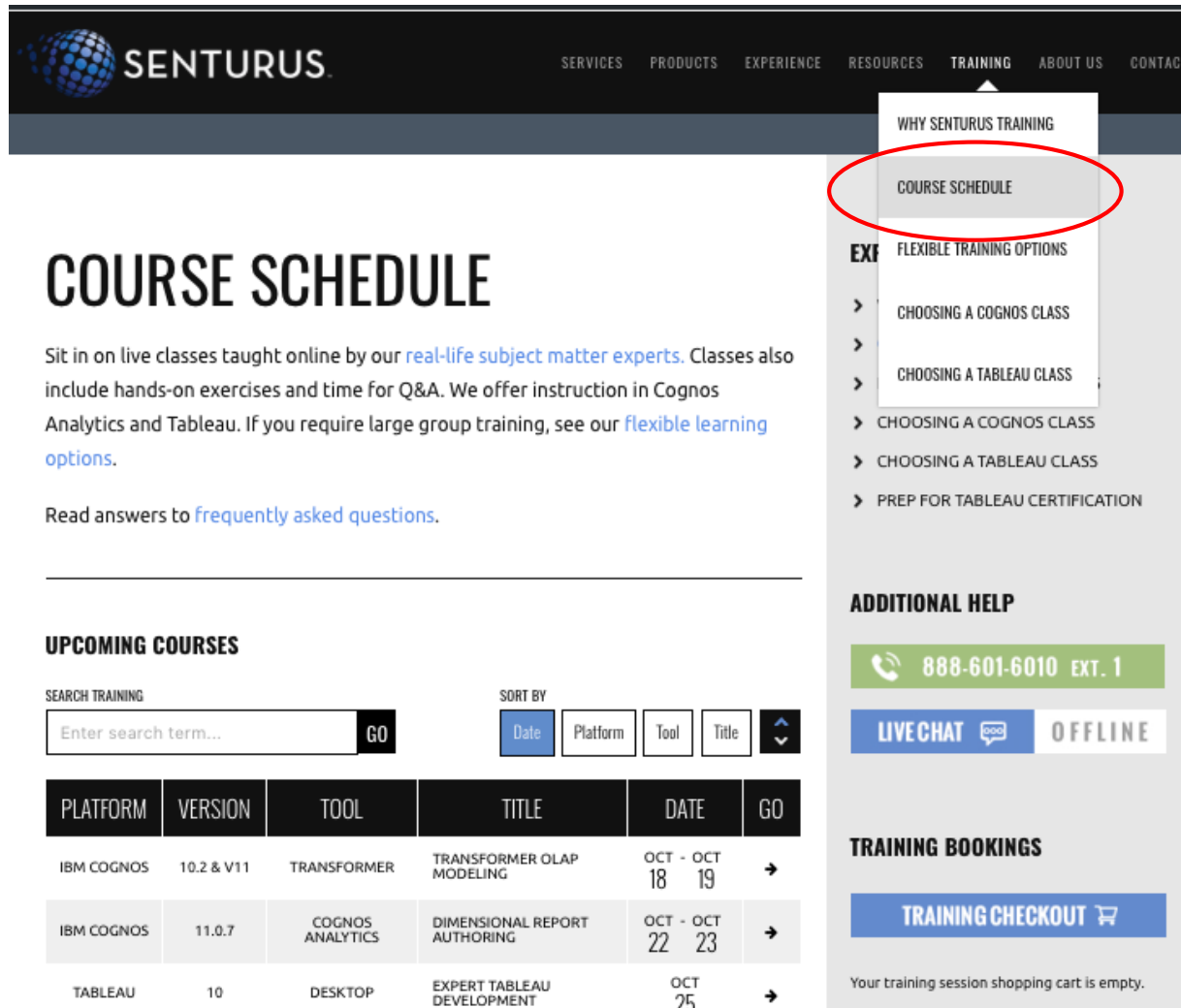http://www.senturus.com/senturus-resources/

BLOG

A great place to find out what's top of mind at Senturus.

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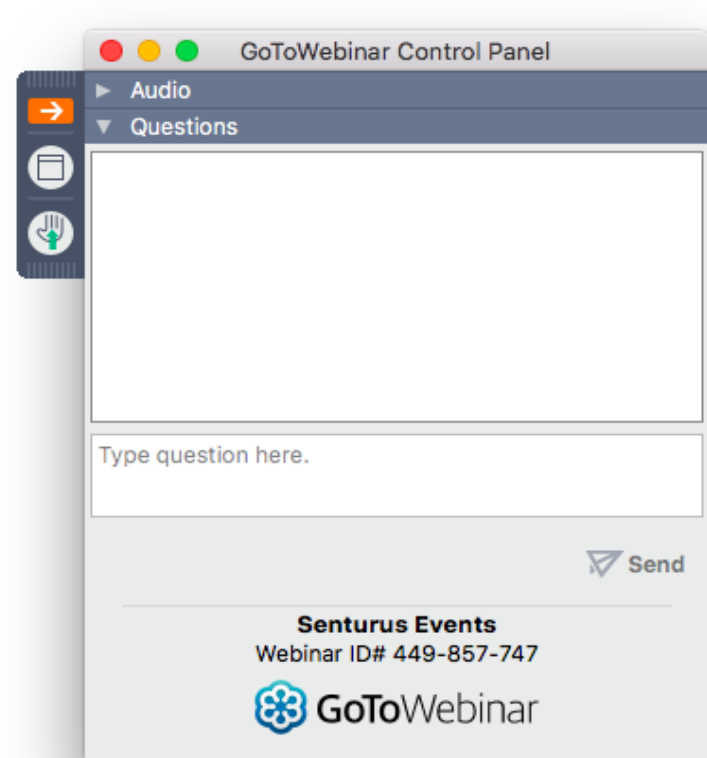
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Cognos and Tableau Training Options

Custom tailored training also available

Q&A

If your question or issue is broader than what can be answered today, contact us at

info@senturus.com

and we will set up a free consultation.

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Thank You!

www.senturus.com
info@senturus.com
888 601 6010

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