



SENTURUS



EMBEDDING TABLEAU IN SALESFORCE DASHBOARDS

How Nutanix Is Improving Sales
Operations Using Sparkler

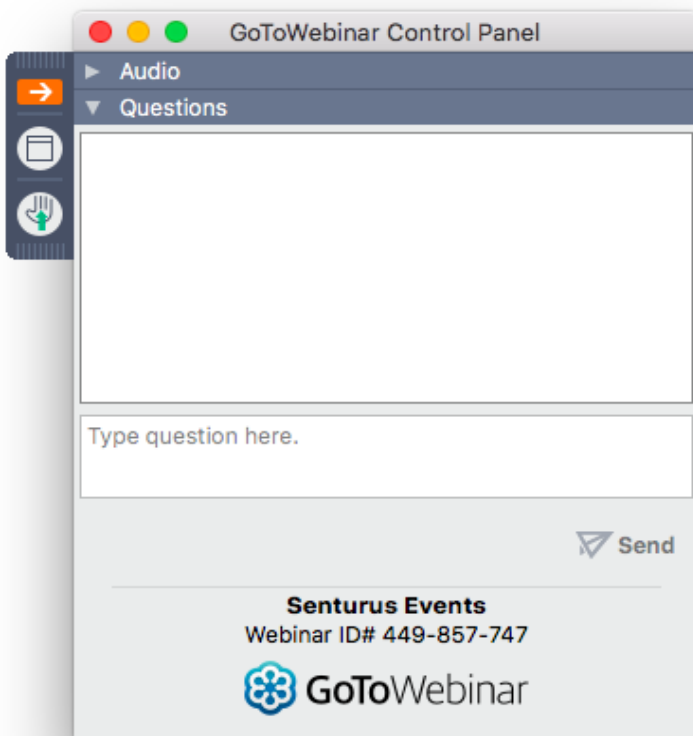


GoToWebinar Control Panel

Click arrow to restore full control panel



Submit questions here



Presentation Slide Deck

www.senturus.com/resources/

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!

SEARCH RESOURCES

GO

SORT BY




Popularity

Date

Title

Type



RESOURCE TITLE	TYPE	GO
EMBEDDING TABLEAU IN SALESFORCE DASHBOARDS A How-to Primer with Demos	 TIPS & TRICKS	→
COGNOS ANALYTICS NOVEMBER 2017 ENHANCEMENTS 11.0.8 Demos and Q&A with IBM Product Team	 FEATURES	→
AERO PRECISION CREATES TABLEAU VIZZES AGAINST LIVE COGNOS DATA Using the Senturus Enterprise Connector	 FEATURES	→



Today's Agenda

- Introductions
- Accessing Salesforce data from Tableau
- Overview of Tableau Sparkler
- Demo
- Sparkler at Nutanix
- Summary/wrap-up
- Senturus overview
- Q&A

Introducing...Today's Presenters



Michael Weinbauer
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

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

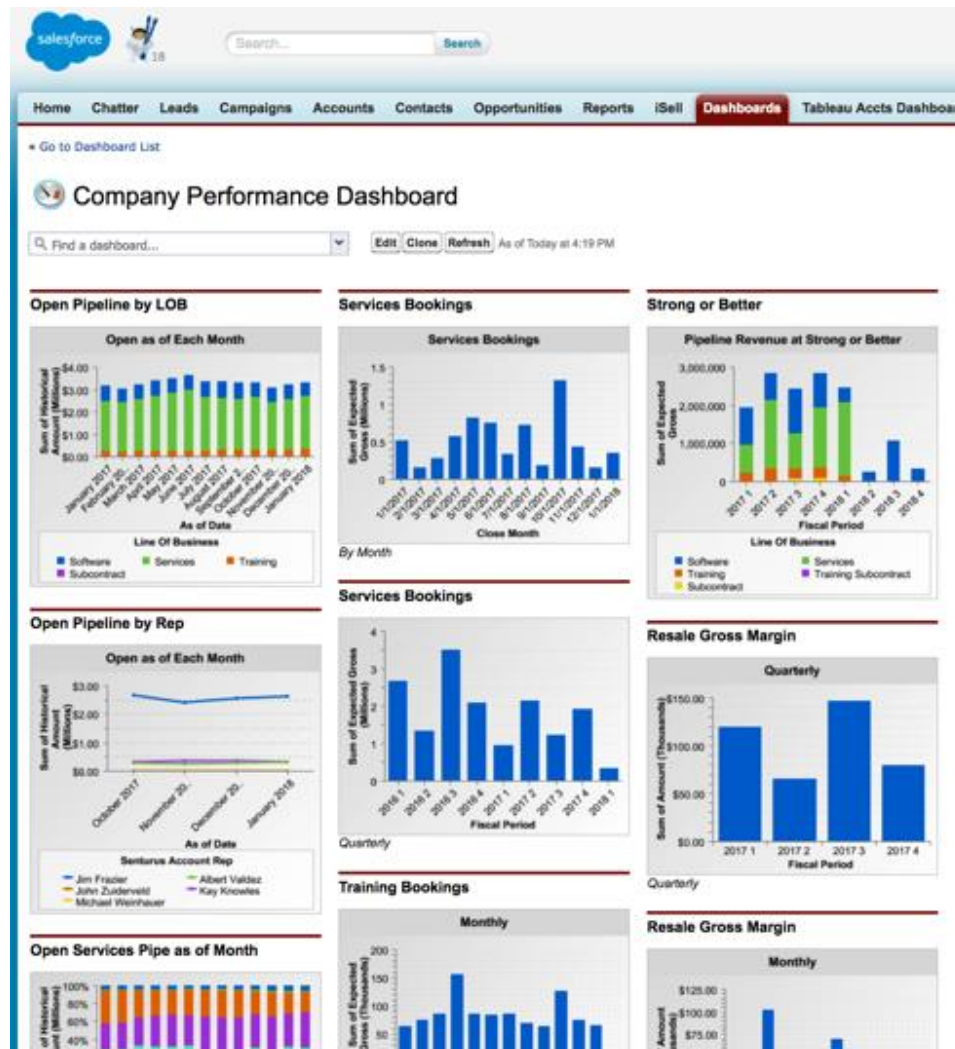


SENTURUS

ACCESSING SALESFORCE DATA

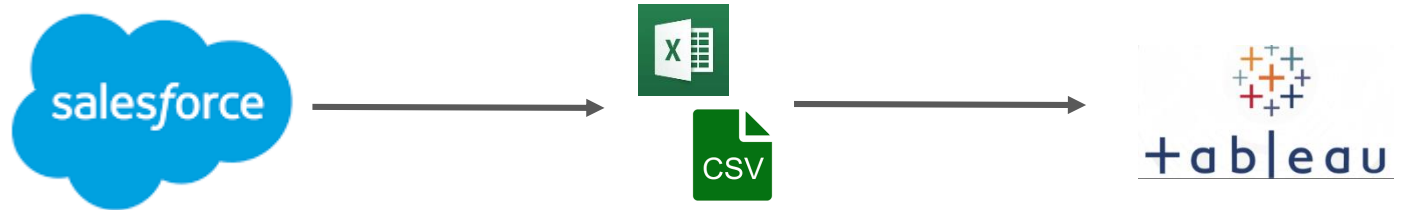
Accessing Salesforce Data

Use Salesforce integrated reporting (no Tableau)

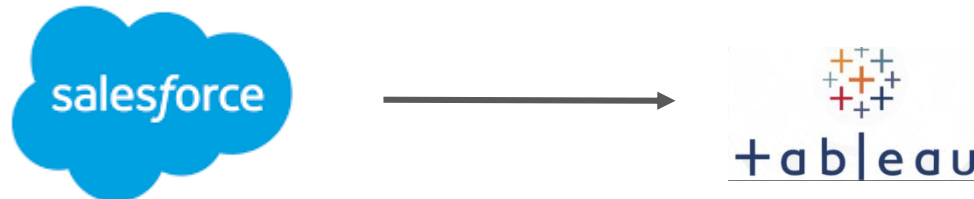


Accessing Salesforce Data from Tableau

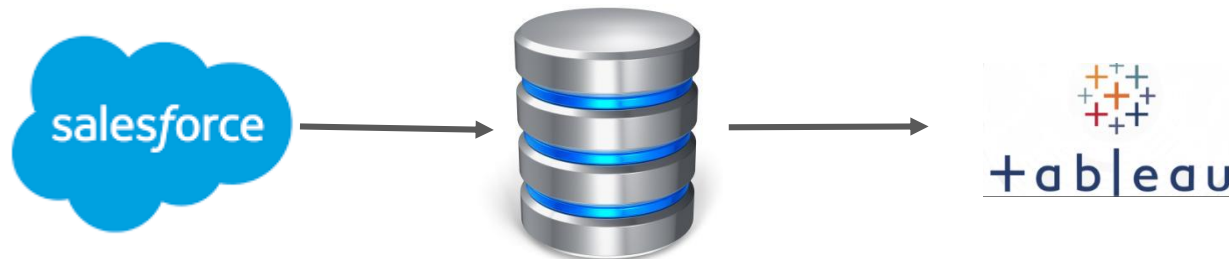
1. Manually extract data from Salesforce into flat files, pull into Tableau



2. Utilize Tableau's direct connections to Salesforce cloud

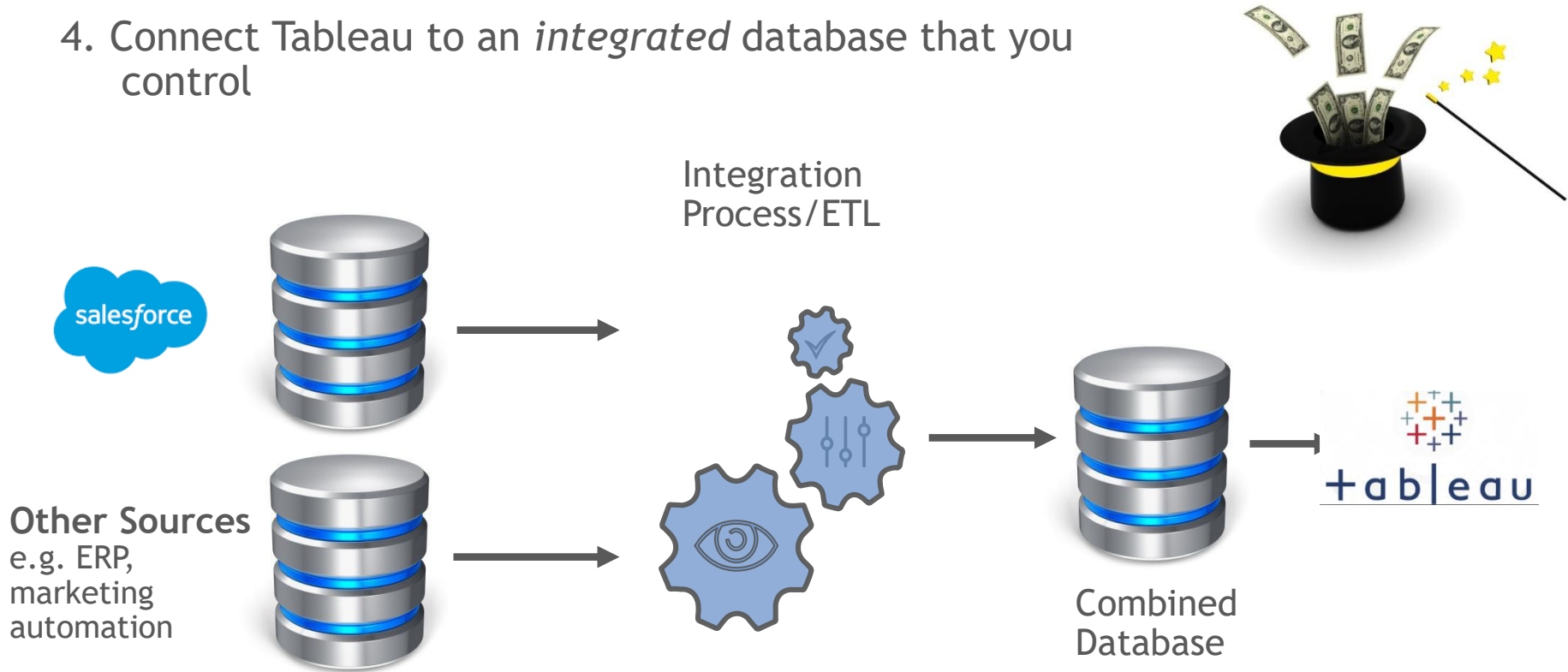


3. Connect Tableau to a replica database of Salesforce data that you control



Accessing Salesforce Data from Tableau

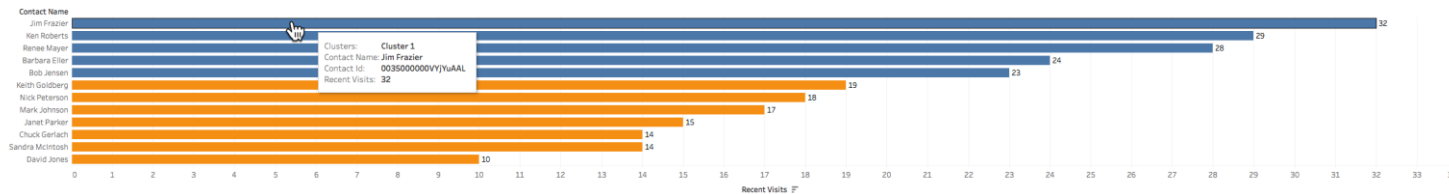
4. Connect Tableau to an *integrated* database that you control



Accessing Salesforce Data from Tableau

Drill from a Tableau dashboard directly into the relevant Salesforce screen

Recent Web Visits from People in Your Pipeline



salesforce

Search... Search

Home Chatter Leads Campaigns Accounts **Contacts** Opportunities Reports iSell Dashboards

Create New...

Shortcut

Unresolved Items

Recent Items

- Jim Frazier
- MaryKate Gozemba
- Melanie Gonzalez
- Olivia Jensen

Contact Jim Frazier

Show Feed

Open Activities [0] | Activity History [20+] | Notes & Attachments [0] | Ops

Contact Detail

Edit Delete Clone LinkedIn

Contact Owner Tony Morris [Change]

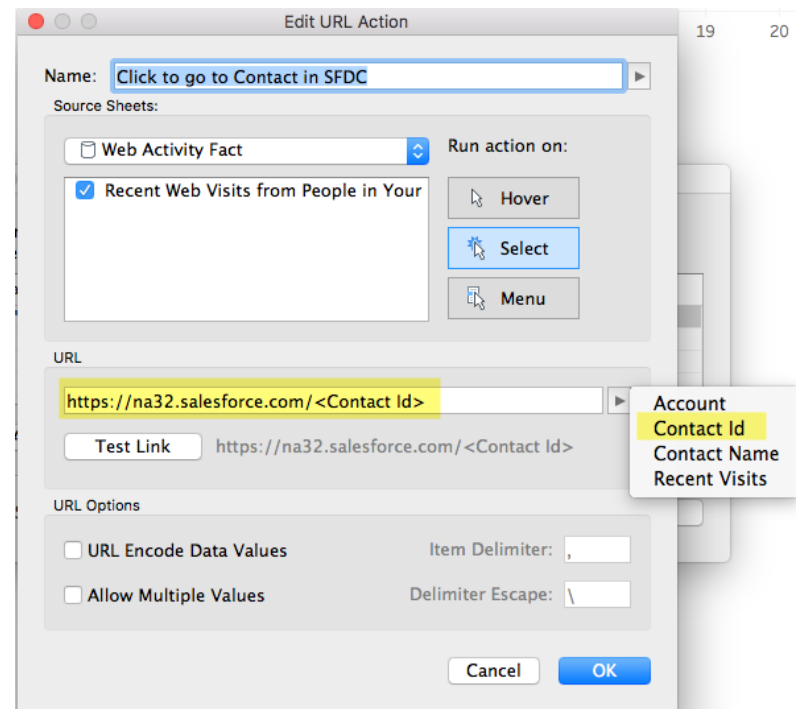
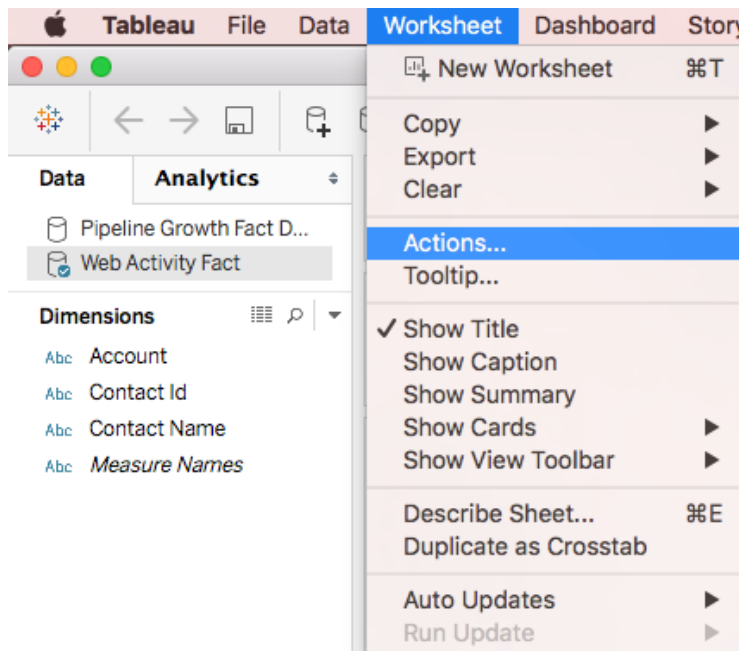
Name Jim Frazier

Account Name Senturus, Inc



















Department Business Analytics

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				

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

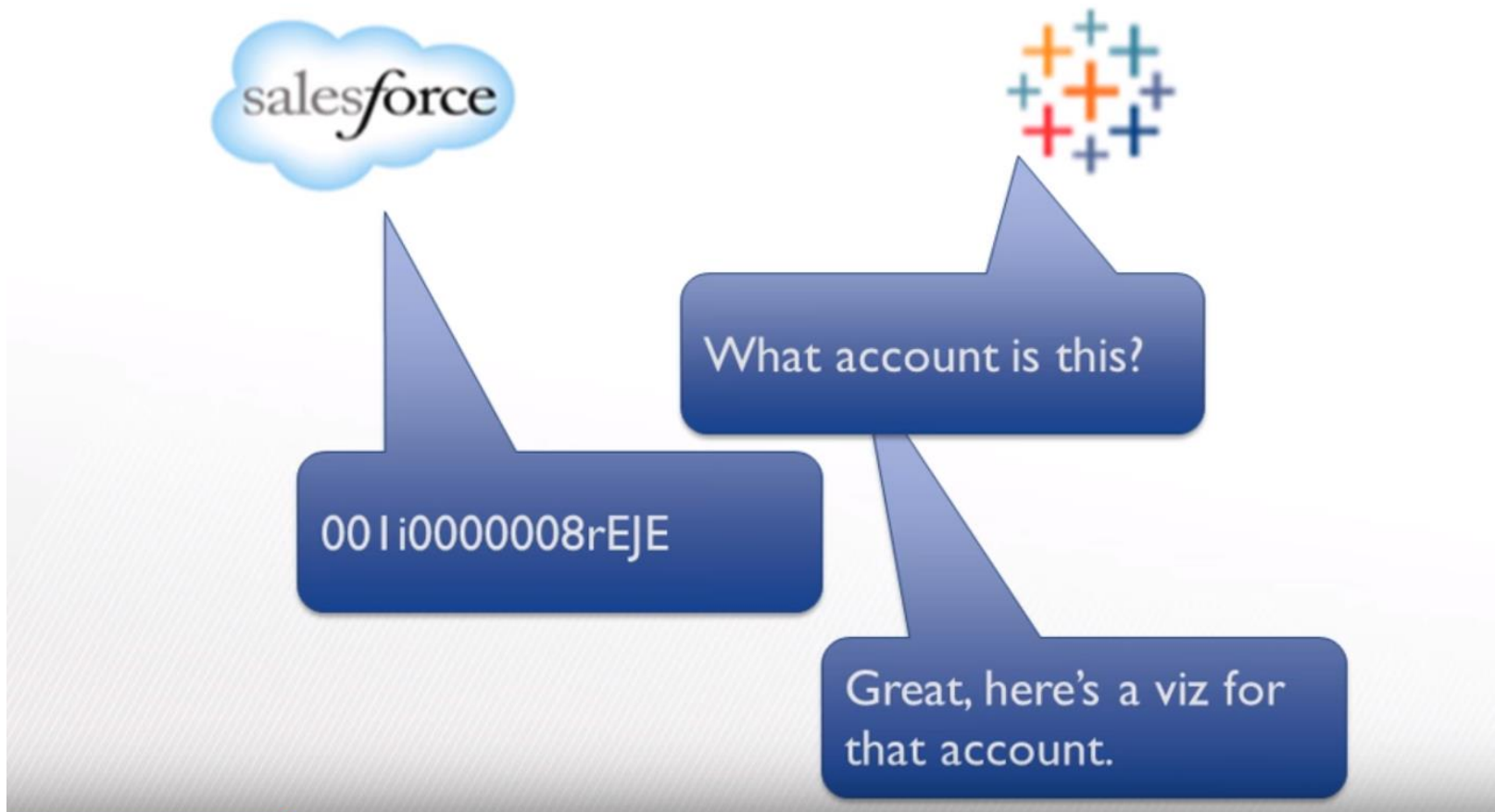


Https
Message encryption



Why Sparkler?

#2: Context without needing to leave Salesforce!

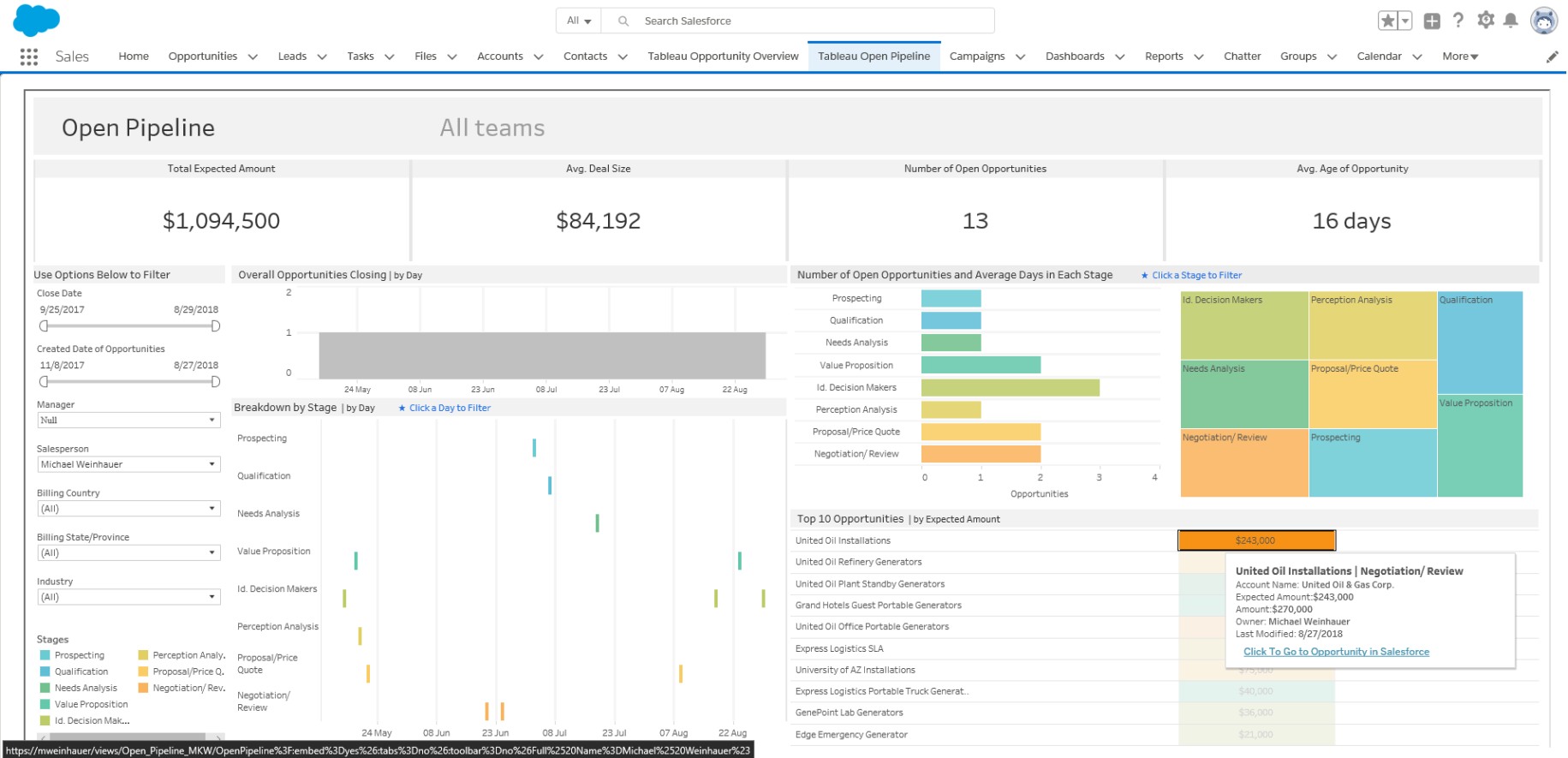


Why Sparkler?

#3: Data BEYOND Salesforce!



Top Level Sales View - Opportunities Dashboard (Lightning)



Opportunities Dashboard (Lightning)

All

[Sales](#) [Home](#) [Opportunities](#) [Leads](#) [Tasks](#) [Files](#) [Accounts](#) [Contacts](#) [Tableau Opportunity Overview](#) [Tableau Open Pipeline](#) [Campaigns](#) [Dashboards](#) [Reports](#) [Chatter](#) [Groups](#) [Calendar](#) [People](#) [Cases](#) [Forecasts](#) [Tableau Accounts Dashboard](#)

Opportunity
United Oil Installations
Account Name
 United Oil & Gas Corp.

Close Date
 6/20/2018

Amount
 \$270,000.00

Opportunity Owner
 Michael Weinbauer

Negotiation / Review

Closed
 ✓ Mark Stage as Complete

[ACTIVITY](#) [CHATTER](#) [DETAILS](#)

▼ Tableau Opportunities

Selected Opportunity vs. Competitors

☒ Keep Only
 ☐ Exclude
 [Legend]

Main Competitor(s):	Honda
Opportunity ID:	0060b00000ole0NAAQ
ExpectedRevenue (Opportunities):	\$125,000.00

[Go to Opportunity](#)

Opportunity Details

Account Name	Stage	Amount	
United Oil & Gas Corp.	Negotiation..	\$270,000.00	

Expected Revenue (Oppor...)	\$200,000		
Expected Revenue (Oppor...)	\$100,000		
	\$0		

Products (0)

Notes & Attachments (0)

Upload Files
 Or drop files

Contact Roles (0)

Stage History (2)

Stage: Negotiation / Review Amount: \$270,000.00 Probability (%): 90% Expected Reve...: \$243,000.00 Close Date: 7/31/2013 Last Modified By: Michael Weinbauer Last Modified: 8/27/2018 4:16 PM	Stage: Negotiation / Review Amount: \$270,000.00 Probability (%): 90% Expected Reve...: \$243,000.00 Close Date: 6/20/2018 Last Modified By: Michael Weinbauer Last Modified: 8/27/2018 4:16 PM
-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

[View All](#)

Opportunity Owner
 Michael Weinbauer

Private ☐

Amount
 \$270,000.00

Expected Revenue
 \$243,000.00

Accounts Dashboard (Lightning)

Cloud

Sales Home Opportunities Leads Tasks Files Accounts Contacts Tableau Opportunity Overview Tableau Open Pipeline Campaigns Dashboards Reports Chatter Groups Calendar People Cases Forecasts Tableau Accounts Dashboard

All Search Salesforce

Star Help Settings Profile

Account

United Oil & Gas Corp.

+ Follow New Contact New Case New Note

Type Customer - Direct Phone (212) 842-5500 Website http://www.uos.com Account Owner Michael Weinhauer Account Site Industry Energy

RELATED DETAILS NEWS

Tableau Accounts

Total Purchase \$2,100K Total Opportunities 10 # of Wins 6 # of Losses 4 Active Opportunities 4 Customer Since 8/18

Opportunities by Close Date

Compare with Other Accounts

Opportunities For This Account

Status	Name (Opportunities)	Close Date	Stage	Amount
Open	United Oil Refinery Generators	8/8/2018	Proposal/Price...	\$203K
	United Oil Plant Standby Generators	7/18/2018	Needs Analysis	\$135K
	United Oil Office Portable Generators	6/24/2018	Negotiation/Re...	\$113K
	United Oil Installations	6/20/2018	Negotiation/Re...	\$243K
	United Oil Standby Generators	8/16/2018	Closed Won	\$120K
Closed	United Oil SLA	8/15/2018	Closed Won	\$120K
	United Oil Refinery Generators	8/1/2018	Closed Won	\$915K
	United Oil Installations	7/1/2018	Closed Won	\$235K
	United Oil Refinery Generators	6/19/2018	Closed Won	\$270K
	United Oil Emergency Generators	6/13/2018	Closed Won	\$440K

Account Owner Michael Weinhauer

Account Name United Oil & Gas Corp.

Parent Account

Active Yes

Upsell Opportunity Yes

Type Customer - Direct

ACTIVITY CHATTER

New Task Log a Call New Event Email

Create a task... Add

Filters: All time All activities All types Refresh Expand All

Next Steps No next steps. To get things moving, add a task or set up a meeting. More Steps

Past Activities No past activity. Past meetings and tasks marked as done show up here. Load More Past Activities



SENTURUS

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



Nutanix - Demo

Marketing

Home
Leads
Contacts
Accounts
Campaigns
Opportunities
Reports
Dashboards
Customer Insights Dash
Reference Activities
Product Lines
Products
Purchase Orders

Create New...

Shortcut
Unresolved Items

Recent Items
FY19Q1-Customer Marketing-Case Study-Cost Capture
Program Customer Marketing Cost Capture
Sara Steffen
Program Nutanix Connect User Group
FY19Q1-Global-C...
FY19Q1-Global-C...
FY18Q4-All Americas Central-User Group-Milwaukee

Deal Registrations
TAM/ISR-My Regs Pending Approval
TAM - ISR - My Regs Not Linked to Opp
TAM/ISR - All My Regs

Custom Links
PO Checklist
Contingent Language Terms
Marketing Hub
New Account Request Form

Messages and Alerts

Customer Account Summary

Welcome Michael Hunter

To find customers: 1) Select attributes. 2) Click "Click Here to Apply Filters" 3) Mouse over the blue bar to view details.

IMPORTANT: These are not public references. Always check with account owner prior to use.

Account Name

(Multiple values)

Theater

(Multiple values)

Region

(All)

Billing Country

(All)

Vertical

(Multiple values)

Industry

(All)

OEM

(All)

Billing State

(All)

Expected Hypervisor on Nutanix

(All)

Primary use case for this deal

(All)

SW Only

(All)

Workload Filter

(Multiple values)

Account Segmentation

(All)

Has Case Study?

(All)

Click Here to Apply Filters

Account Name	IB400	G2K	Has Case Study?	
Northern Trust (Global HQ)	IB400	562	Not Available	769.0
SOCIETE GENERALE HQ	IB400	161	Not Available	588.0
Claranet France	IB400	Null	Not Available	194.0
JetBlue Airways	IB400	1438	Not Available	150.0
Yahoo Japan	IB400	18	Available	161.0
New York Life	IB400	Null	Not Available	228.0
BART	IB400	Null	Available	82.0
Blue Cross Blue Shield of...	IB400	Null	Not Available	66.0
Tokyo Stock Exchange	IB400	1040	Not Available	85.0
Spirit Airlines, Inc.	IB400	Null	Not Available	65.0
SK Telecom	IB400	476	Not Available	60.0
American Red Cross	IB400	Null	Available	48.0
Empire Life	IB400	1871	Available	49.0
Arizona State University	IB400	Null	Available	51.0
Mary Kay (China) Cosmeti...	IB400	Null	Available	34.0
Unilever	IB400	Null	Available	33.0

0
100
200
300
400
500
600
700
800

Total Nodes

Nutanix - Demo

Marketing

Home
Leads
Contacts
Accounts
Campaigns
Opportunities
Reports
Dashboards
Customer Insights Dash
Reference Activities
Product Lines
Products
Purchase Orders

Create New...

Shortcuts

- Unresolved Items

Recent Items

- FY19Q1-Customer Marketing-Case Study-Cost Capture
- Program Customer Marketing Cost Capture
- Sara Steffen
- Program Nutanix Connect User Group
- FY19Q1-Global-C...
- FY19Q1-Global-C...
- FY18Q4-All Americas Central-User Group-Milwaukee

Deal Registrations

- TAM/ISR-My Regs Pending Approval
- TAM - ISR - My Regs Not Linked to Opp
- TAM/ISR - All My Regs

Custom Links

- PO Checklist
- Contingent Language Terms
- Marketing Hub
- New Account Request Form

Messages and Alerts

Customer Account Summary

Welcome Michael Hunter

To find customers: 1) Select attributes. 2) Click "Click Here to Apply Filters" 3) Mouse

IMPORTANT: These are not public references. Always check with account owner prior

Account Name
Theater

(Multiple values)
(Multiple values)

Vertical
Industry

(Multiple values)
(All)

Expected Hypervisor on Nutanix
Primary use case for this deal

(All)
(All)

Account Segmentation
Has Case Study?

(All)
(All)

Account Name
IB400
G2K
Has Case Study?

Northern Trust (Global HQ)
IB400
562
Not Available

SOCIETE GENERALE HQ
IB400
161
Not Available

Claranet France
IB400
Null
Not Available

JetBlue Airways
IB400
1438
Not Available

Yahoo Japan
IB400
18
Available

New York Life
IB400
Null
Not Available

BART
IB400
Null
Available

Blue Cross Blue Shield of..
IB400
Null
Not Available

Tokyo Stock Exchange
IB400
1040
Not Available

Spirit Airlines, Inc.
IB400
Null
Not Available

SK Telecom
IB400
476
Not Available

American Red Cross
IB400
Null
Available

Empire Life
IB400
1871
Available

Arizona State University
IB400
Null
Available

Mary Kay (China) Cosmeti..
IB400
Null
Available

0
100
200
300
400
500
600
700
800

Total Nodes

Account Name: JetBlue Airways
Account Owner: Matthew Calamusa
IB400: IB400
G2K: 1438
Segmentation Type: Enterprise
Satisfaction Level: Very Satisfied
Case Study/Seismic Link:
Reference Type:

Nodes: 150.0

Theater: Americas
Region: Americas North
Sub Region: NY/NJ Enterprise Select

Vertical: Heavy Industry
Industry: Transportation/Logistics

Primary use case for this deal: *
Other Use Cases: VDI
Expected Hypervisor: *
Hypervisors Used: Nutanix AHV
Workloads: *

SW Only: False
OEM: Appliance
[JetBlue Airways](#)

☒ Keep Only
☐ Exclude

Billing Country

(All)

Billing State

(All)

Workload Filter

(Multiple values)

769.0

588.0

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

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

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

USE TABLEAU TO GET TO THE GOLD HIDDEN IN SALESFORCE

March 01, 2018 DATA PREPARATION, SALESFORCE REPORTING, TABLEAU



SECRETS TO UNEARTHING MISSING VALUABLE INDICATORS

Senturus Can Help!

Install Tableau Sparkler 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**





SENTURUS

WHO WE ARE

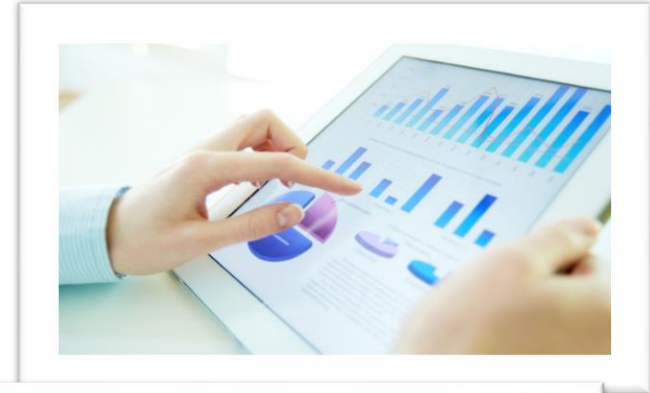
Business Analytics Consultants

Bridging the Gap Between Data & Decision Making



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



SEPHORA



KELLY-MOORE
PAINTS™



fb FREMONT BANK



CRC
HEALTH GROUP



NETGEAR®
Connect with Innovation™

U.S. AIR FORCE

Genentech
A Member of the Roche Group



National
Semiconductor

KORBEL®
CALIFORNIA CHAMPAGNE



lisi AEROSPACE



MEYER®



TriNet
Ambitions realized™





SENTURUS

ADDITIONAL RESOURCES

Upcoming Events

senturus.com/events



THE WEEKLY WIND DOWN

OUR TRAINERS SHARE THEIR FAVORITE TIPS

Every Friday - 11am PT - 30 minutes

norcalcognosusers.com



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

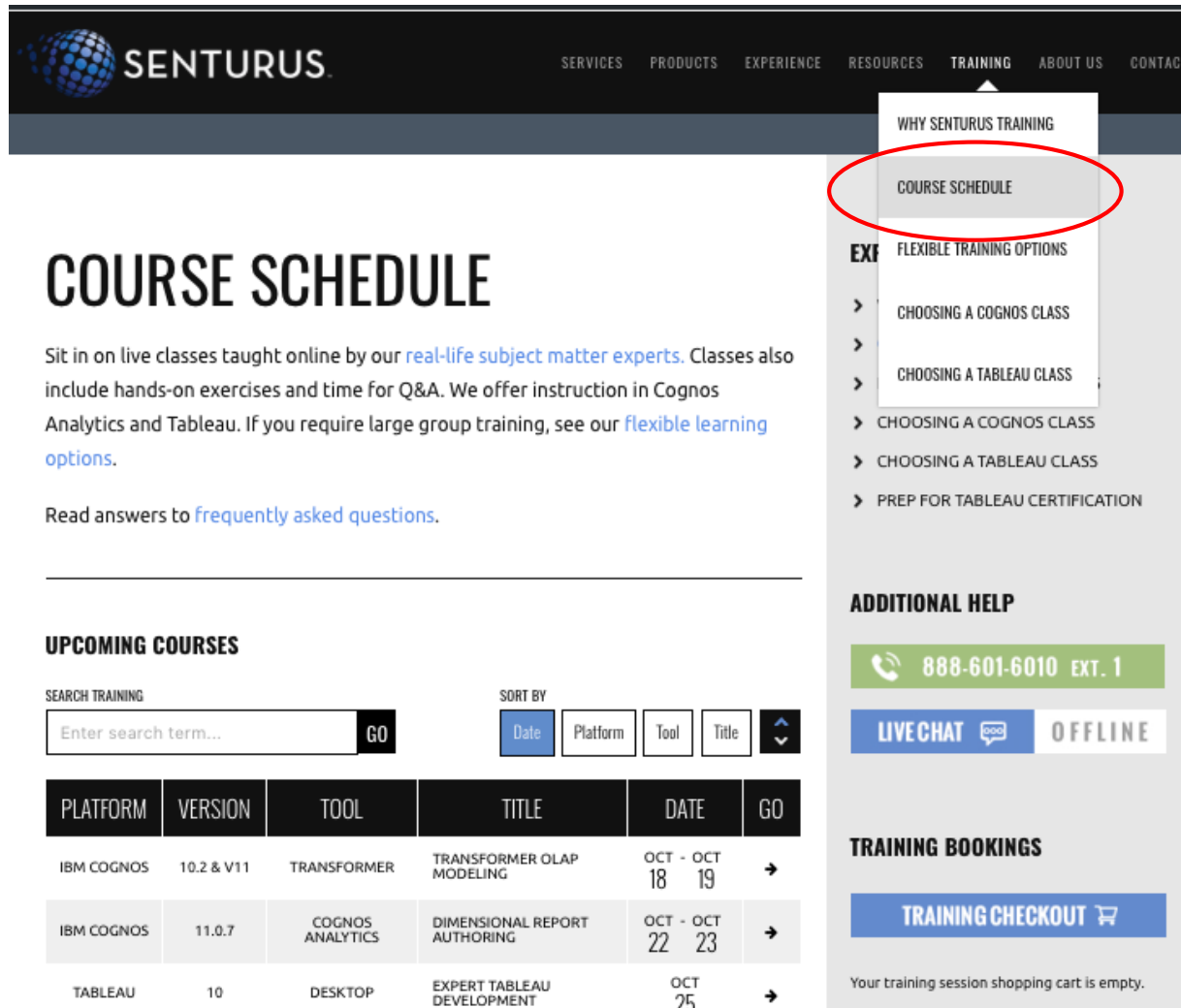
A great place to find out what's top of mind at Senturus.



RESOURCE LIBRARY

An extensive, free library of past webinars, demos, whitepapers, presentations, helpful hints and more.

Cognos and Tableau Training Options



SENTURUS SERVICES PRODUCTS EXPERIENCE RESOURCES **TRAINING** ABOUT US CONTACT

COURSE SCHEDULE

Sit in on live classes taught online by our [real-life subject matter experts](#). Classes also include hands-on exercises and time for Q&A. We offer instruction in Cognos Analytics and Tableau. If you require large group training, see our [flexible learning options](#).

Read answers to [frequently asked questions](#).

UPCOMING COURSES

SEARCH TRAINING **GO**

SORT BY Date Platform Tool Title ⬆

PLATFORM	VERSION	TOOL	TITLE	DATE	GO
IBM COGNOS	10.2 & V11	TRANSFORMER	TRANSFORMER OLAP MODELING	OCT - OCT 18 - 19	→
IBM COGNOS	11.0.7	COGNOS ANALYTICS	DIMENSIONAL REPORT AUTHORIZING	OCT - OCT 22 - 23	→
TABLEAU	10	DESKTOP	EXPERT TABLEAU DEVELOPMENT	OCT 25	→

WHY SENTURUS TRAINING

COURSE SCHEDULE

EXTENSIVE FLEXIBLE TRAINING OPTIONS

- CHOOSING A COGNOS CLASS
- CHOOSING A TABLEAU CLASS
- CHOOSING A COGNOS CLASS
- CHOOSING A TABLEAU CLASS
- PREP FOR TABLEAU CERTIFICATION

ADDITIONAL HELP

888-601-6010 EXT. 1

LIVECHAT **OFFLINE**

TRAINING BOOKINGS

TRAINING CHECKOUT

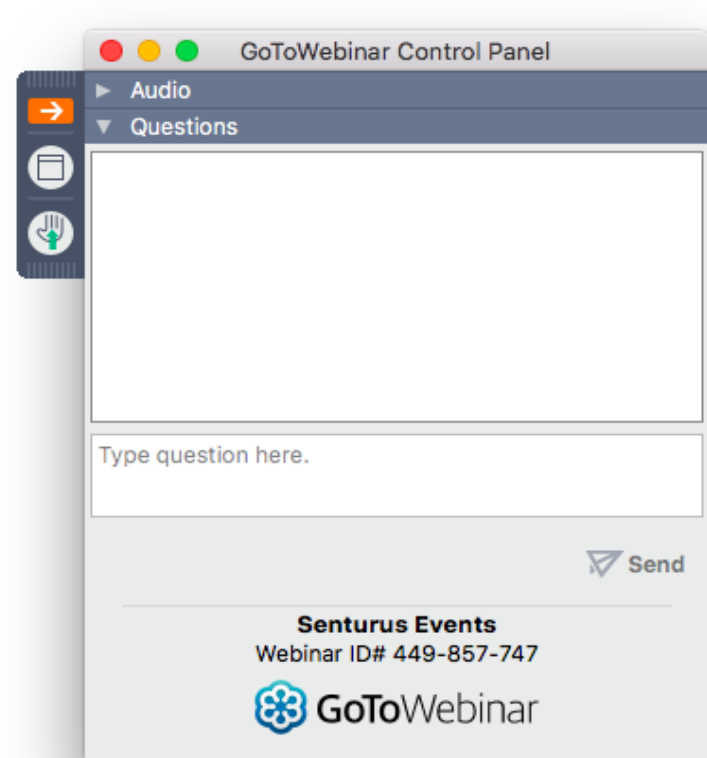
Your training session shopping cart is empty.

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.



Thank You!

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



©2018 Senturus, Inc. All rights reserved.
This entire presentation is copyrighted and may not be
reused or distributed without the written consent of
Senturus, Inc.

