Client Issue

Tableau was being used internally by our client, an integrated media and entertainment firm, with over 300 users. The client was encountering difficulties as a result of the absence of established procedures, governance, and monitoring, and the client wanted an overall plan for enhancing the capacity of the users to operate successfully within Tableau.

Furthermore, Tableau had not been updated in some years, and consumers were yearning for greater capability provided by newer versions. All work, both UAT and production, was created and handled in the production environment, aggravating performance difficulties further.

The Business Intelligence team was striving to resolve the issues, but they needed outside help. Users were complaining about general speed concerns, and the IT team was dealing with security issues that gave certain users far too many permissions. Furthermore, while all user licenses were given, management was convinced that not all users were active.

Specifics of the Client Challenge:
- The production environment was used for both production and UAT.
- Due to a lack of workbook management, users were unsure about the latest versions of workbooks to access and use.
- There had been no establishment of guiding principles.
- There were concerns with performance.
- An upgrade was required.
- There was no intent to expand the number of users.

Our Solution

We started with a kickoff meeting to gain a thorough knowledge of the concerns. We visited with many departments ranging from Marketing to Finance to discover any issues that had gone unnoticed. We prepared an overarching scope document to lead the project when we finished the interviews.

The Tableau dashboard was created to provide insight to leadership, and it precisely highlighted usage per user and consumption per worksheet. We were able to identify a number of inactive users as a result of these steps, enabling license reassignment and saving the client from having to acquire extra licenses.

We standardized processes and collaborated with the team to make sure they were viable and successful. Governance was formed in order to address the highlighted security vulnerabilities. Commonly used data sources were transferred from the production environment to Tableau Server to decrease load and improve speed while also providing a single source that was constantly updated for user happiness and effectiveness.

Finally, we isolated the UAT environment from the Production environment to facilitate testing while reducing the strain on production resources. Monitoring (TabMon) was introduced to track server consumption, and alarms were set up to address performance concerns. We improved the entire tableau environment in collaboration with the Business Intelligence team, and we also developed a Center of Excellence to ensure their continued success.

Key Benefits

The client was delighted with the project's results and gained several benefits as a consequence of it.

- Tableau has been updated to provide crucial capabilities requested by users.
- Production output grew by approximately 20%. TPS (Transactions per second)
- Moving common/critical workbooks to the Tableau server improved user satisfaction and data dependability overall (due to centralization and continuous updating)
- Standardized methods enabled better dependability.
- Best practices were developed and disseminated within the company in order to improve user outcomes.
- The Center of Excellence was established to assure ongoing progress.
- The project enhanced the number of concurrent users (processes, governance, monitoring, server load and more contributed to better performance)
- The client was able to expand users without incurring additional expenditures.