

Create a road map for our Tableau Hackathon submission concept, Agentic Analytics Studio.

Thinking cancelled >

resume

Thought for 17m 27s >

Cool, let's pick this back up and lay out a clear roadmap for **Agentic Analytics Studio** as your Tableau Hackathon submission.

## 1. Quick alignment: What we're actually building

**Agentic Analytics Studio** = a flagship Tableau Next app that turns your **Agentic Analytics Protocol (AAP)** into a **multi-agent decision room**:

- AAP is a **structured message protocol** for analytics:  
Question → Metric selection → Query → Insight → Action plan → Outcome
- Studio uses multiple agents (via Agentforce) to:
  1. Understand questions and map them to semantic metrics/dimensions.
  2. Build queries over your Tableau semantic model.
  3. Generate insight cards linked to vizzes.
  4. Recommend and execute actions (Salesforce / Flows / Slack, etc.).
  5. Track outcomes over time (closed loop).

Target vertical (default): **SaaS churn & retention triage** for Customer Success.  
(You can swap vertical later; the roadmap still works.)

Hackathon context in 10 seconds:

- **Submission window:** Nov 12, 2025, 11:00am PST → Jan 12, 2026, 12:00pm PST. Tableau Hackath...

- **Mission:** Build something groundbreaking with Tableau Next/Cloud + Salesforce/Slack/Agentforce. Tableau Hackath...
- **Judging criteria:** Innovation (40%), Technical Execution (30%), Impact (20%), UX & Presentation (10%). Tableau Hackath...
- **Prize categories** include Grand Prize plus Best Data Layer Implementation, Best Use of Semantic Modeling, Best Use of Actionable Analytics, Best Product Extensibility. Tableau Hackath... +1

We'll design the roadmap so Studio can credibly compete for **all** of those.

2. Timeline at a glance (from now to deadline)

Using the official schedule and Devpost’s own “give yourself a schedule” advice as inspiration.

Tableau Hackath... +1

Phase	Dates (suggested)	Goal
0. Positioning & vertical	Dec 3 – Dec 5	Lock use case, persona, and prize strategy
1. AAP + data/semantic design	Dec 6 – Dec 15	Design protocol, semantic model, and architecture
2. Agents & orchestration	Dec 16 – Dec 26	Implement core AAP pipeline + first vertical “happy path”
3. Decision Studio UI & closed loop	Dec 27 – Jan 5	Build the Tableau Next app UI and outcome loop
4. Polish & submission	Jan 6 – Jan 11	Hardening, video, docs, and final Devpost submission

You *must* be done before **Jan 12 at 12:00pm PST** – we’ll aim to submit on the 11th. Tableau Hackath...

3. Phase-by-phase roadmap

Phase 0 (Dec 3–5) – Positioning, persona, and prize targeting

Objectives

- Choose **one vertical** (e.g., SaaS churn) and a primary persona (CSM/CS lead).
- Make explicit how Studio hits **each prize category** and the main rubric.

## Key steps

### 1. Define the story

- Persona: "Mid-market SaaS Customer Success Manager with 80 accounts."
- Pain: Too many dashboards, not enough time → missed churn signals.
- 3–5 canonical questions Studio must answer:
  - "Which customers are most at risk this quarter and why?"
  - "What has historically worked to save similar at-risk accounts?"
  - "If I launch X action, what's the expected impact?"

### 2. Map to judging criteria

- Innovation (40%): AAP as a **reusable pattern** for agentic analytics + flagship decision room UI. Tableau Hackath...
- Technical Execution (30%): Real agents, semantic model, working action flows, not a "fake copilot." Tableau Hackath...
- Impact (20%): Show time saved + churn risk reduced in your narrative/demo. Tableau Hackath...
- UX & Presentation (10%): Conversation + viz + action cards + clean video story. Tableau Hackath...

### 3. Environment setup

- Request **Tableau Next Salesforce org access** (form from Resources page). Tableau Hackath...
- Join the **Slack channels** for questions (#temp-tableau-hackathon-general / -questions). Tableau Hackath...
- Decide tech stack:
  - Backend/orchestrator: Node/TypeScript or Python.
  - Storage: simple DB or platform storage for AAP message log.

## Outputs

- 1–2 page **concept brief** (persona, use case, target prizes, rubric mapping).
- Verified access to **org + technical resources** (docs, Trailhead, dev tools). Tableau Hackath...

## Phase 1 (Dec 6–15) – AAP spec + data & semantic model

### Objectives

- Turn AAP into a concrete, **minimal JSON protocol** for this hackathon.

- Design a **strong semantic model and data layer** that can win data-layer/semantic prizes.

## Key steps

### 1. AAP v0.1 spec (hackathon scope)

Define canonical message types:

- `Question` – NL question, persona/context.
- `MetricSelection` – semantic metrics, dimensions, filters.
- `Query` – logical query definition (grain, filters, aggregations).
- `InsightCard` – title, explanation, linked viz mark, supporting stats.
- `ActionPlan` – actions + targets + rationale.
- `ActionOutcome` – post-action KPIs.

Include a shared envelope: `id`, `conversation_id`, `actor`, `timestamp`, `payload`.

### 2. Data & semantic model

- Core entities: `Account`, `Subscription`, `UsageEvent`, `SupportTicket`, `HealthScore`, `CSM`.
- Metrics: churn risk score, ARR, usage delta, ticket volume, NPS.
- In Tableau's semantic/data layer:
  - Define these as **named metrics/dimensions** with clear descriptions.
  - Implement simple **row-level security** (e.g., CSM only sees own accounts).
  - Document how agents reason on these semantic objects (not raw columns) → ammo for **Best Use of Semantic Modeling** and **Best Data Layer Implementation**.

Tableau Hackath... +1

### 3. Architecture diagram

- Draw boxes/arrows for:
  - Tableau Next app (Decision Studio UI).
  - AAP orchestrator service.
  - Agentforce / LLM.
  - Tableau semantic model & vizzes.
  - Salesforce / Flow / Slack for actions.
- Decide how UI talks to backend (REST endpoints or GraphQL).

## Outputs

- AAP v0.1 markdown spec with example payloads.
- Semantic model design doc + ERD.
- Architecture diagram to reuse in README and submission.

## Phase 2 (Dec 16–26) – Agents + end-to-end “happy path”

### Objectives

- Build a **working vertical slice**: question → insights → actions on real(ish) data.
- Focus on **one golden scenario**, not breadth.

### Key steps

#### 1. Question Agent (Question → MetricSelection)

- Use Agentforce/LLM to:
  - Parse NL question.
  - Map phrases to semantic metrics/dimensions (e.g., “at-risk customers” → metric `Churn Risk Score`, filter `risk > threshold`).
- Emit Question and MetricSelection messages to AAP log.

#### 2. Query Agent (MetricSelection → Query → Viz)

- Implement logic that:
  - Translates MetricSelection to Tableau queries / viz filters.
  - Updates a central “Churn Overview” viz plus an “Account Detail” viz.
- Make sure you can reconstruct: **which question produced which viz** (IDs in AAP).

#### 3. Insight Agent (query result → InsightCards)

- Start simple but concrete:
  - Top N high-risk/high-ARR accounts.
  - Accounts with falling product usage and rising support tickets.
- Wrap them as `InsightCard`s with:
  - Short title (“High-value at-risk accounts”),
  - Single sentence explanation,
  - Link to a specific mark/selection in the viz.

#### 4. Action Agent (InsightCard → ActionPlan → Salesforce)

- For each card type, define 1–3 actions:
  - “Create ‘Save Plan’ task for CSM.”
  - “Start renewal discount approval process.”
  - “Schedule executive outreach meeting.”
- Implement via Salesforce Flows or APIs:
  - Button in Studio → AAP `ActionPlan` → Flow/API call → created task/case/opp update.

#### 5. Golden scenario

- Script one fully working flow:

1. User asks: "Which big customers are likely to churn this quarter?"
2. Agents surface insight cards and viz.
3. User clicks an insight → triggers recommended actions.
4. You show the created Salesforce artifacts.

## Outputs

- Running back-end with AAP logging + 3–4 agent types.
- A reproducible **"happy path" demo** (even if UI is still rough).

## Phase 3 (Dec 27–Jan 5) – Decision Studio UI + closed loop + extensibility story

### Objectives

- Wrap the engine in a **judge-friendly Tableau Next app**.
- Add light **outcome tracking** and a clear **extensibility narrative**.

### Key steps

#### 1. Decision Studio UX

Using Tableau UI / React components from the Resources page for a Tableau-native feel.

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- **Left: Conversation panel**
  - Chat bubbles.
  - Quick chips for common questions.
  - Show which agent is speaking when appropriate.
- **Center: Viz canvas**
  - Churn overview heatmap / funnel.
  - Account detail viz that updates as user interacts.
- **Right: Action & history panel**
  - Recommended actions as cards with one-click buttons.
  - History feed of executed actions with timestamps.

#### 2. Closed-loop outcomes

- After actions, recompute key KPIs (usage, tickets, risk).
- Show simple before/after mini-cards:
  - "After 30 days, usage ↑ 18%, tickets ↓ 22%."
- Emit `ActionOutcome` messages back into AAP log.

### 3. Extensibility framing (Best Product Extensibility) Tableau Hackath...

- Treat AAP as a **standard**:
  - New vertical = new semantic model + prompts, same protocol.
  - New tools/agents declare which AAP message types they consume/produce.
- Implement a small **agent manifest** (JSON/YAML):
  - Name, description,
  - Input/Output AAP message types,
  - Endpoint/config.

### 4. Start the Devpost submission

Fill in a first pass of the required fields now (so you're not scrambling later): Tableau Hackath...

- Name: *Agentic Analytics Studio*.
- 1–2 sentence pitch.
- Draft long description (problem, solution, tech, impact).
- Most of the "APIs & dev tools used" list (Tableau Next, Agentforce, Salesforce, Tableau UI, etc.).
- Link the repo (even if WIP).

### Outputs

- Working **Decision Studio** app with your golden path fully clickable.
- Draft **Devpost submission** ready for polishing.
- Small "extensibility & AAP standard" write-up.

## Phase 4 (Jan 6–Jan 11) – Polish, pitch, and final submission

### Objectives

- Turn your working prototype into a **competition-grade entry**.
- Maximize scores on **all four rubric dimensions**. Tableau Hackath...

### Key steps

#### 1. Hardening & UX shine

- Add error states and guardrails:
  - Helpful messages when an agent fails ("I couldn't find that metric, try...").
- Tighten copy:
  - Consistent naming for AAP, Insight Cards, Decision Studio, etc.

- Add small delights:
  - e.g., subtle animation when an action succeeds and appears in history.

## 2. 5-minute demo video

Required by Devpost: public video (~5 min) showing the solution in action. Tableau Hackath...

Script:

1. Problem & persona (30–45 seconds).
2. Quick architecture overview (AAP + agents + Tableau Next).
3. Live demo of the golden scenario.
4. Show semantic layer & AAP messages briefly (screens/JSON).
5. Close with:
  - How Studio generalizes beyond churn.
  - How it hits each prize category.

## 3. Docs & README

- README sections:
  - What is Agentic Analytics Studio?
  - How AAP works (with example messages).
  - Architecture diagram.
  - Setup steps (org, config).
  - "If we had more time..." future extensions (Devpost explicitly asks for potential improvements). Tableau Hackath...

## 4. Final checks + submission

- Confirm all Devpost requirements are met:
  - Org ID + admin credentials (for judges).
  - Text description, pitch, video link, repo link, APIs/tools list. Tableau Hackath...
- Submit **no later than Jan 11** to safely beat the **Jan 12, 12:00pm PST** deadline.

Tableau Hackath... +1

## Outputs

- Final **Devpost submission**.
- Demo video and repo that tell the story even without you in the room.



If you tell me roughly **how big your team is and what skills you each have**, I can turn this roadmap into a role-by-role task breakdown (who owns what in each phase) so it's immediately actionable.



 Sources