

# Tableau Pulse Workshop (2026)

Business Applications Co., Ltd.

# Tableau

## The World's #1 Analytics Platform

### Evolution of Analytics



Pre 2003

Traditional Reporting

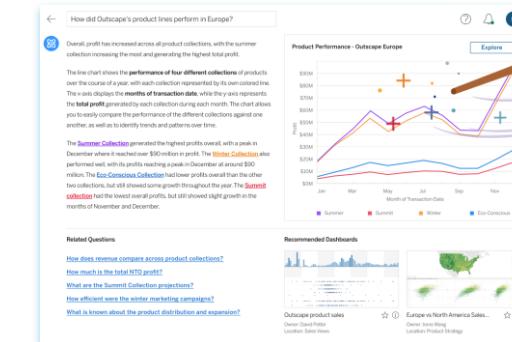
See Data



2004 - 2022

Self-Serve Analytics

See and Understand Data



2023 & Beyond

AI + Analytics for Everyone

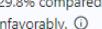
See, Understand, and Make Decisions with Data



# Tableau AI extends your Data Experiences

AI infused in your data journey to accelerate your impact

## Today's Pulse

Last updated yesterday  
 + Last week, the **Average Call Handle Time** spiked to 8.3 minutes, down by 20.0% compared to last month. On a positive note, the number of customers who increased by 29.8% compared to the same time last month. Overall, 3 favorably, 3 unfavorably. 

## Natural Language Insights

Tableau Pulse

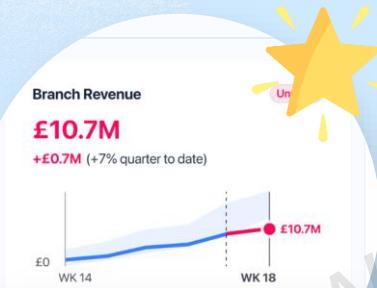


## Root Cause Analysis

Tableau Pulse

## Business Signal Detection

Tableau Pulse



## AI-Assisted Creation

Tableau Einstein Copilot

show me the most popular flats by reviews  
 I will show a bar chart with the flats on the x-axis and the total number of reviews on the y-axis. The flats will be sorted by the

## AI-Assisted Calculations

Einstein Copilot

Extract customer postal code from mailing address  
 You can use the REGEXP\_EXTRACT function to extract part of a string that matches a specific pattern. To extract the postal code from the Customer Mailing Address field, try this:  
 Replace calculation  
 REGEXP\_EXTRACT([Customer Mailing Address], "(\\d{5})\\D\*\$")

## Einstein Predictions - Churn

6.71

Top Predictors  
 Negative Interactions: +12.25  
 Positive Feedback on Social Media: -10.52  
 Negative Interactions and Invite Event is false: +10.45

## Predictive AI

Einstein Prediction

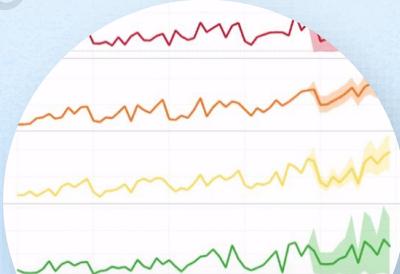
## Smart Recommendations

Tableau Cloud



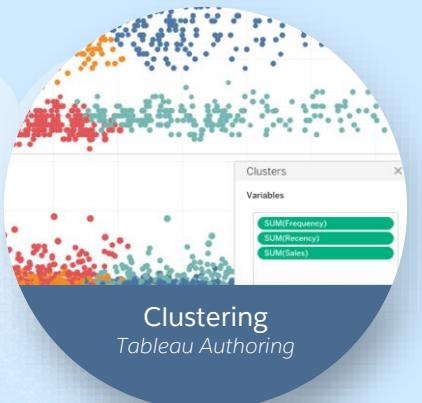
## Forecasting

Tableau Authoring



## Clustering

Tableau Authoring



## External Computes

Tableau Authoring

```
# Import libraries
import pandas as pd
from collections import Counter
import string
import re
```

# Tableau makes trusted insights accessible to all with AI

Tableau  
Pulse

The image displays two main interface components against a light blue background with white clouds. On the left is the Tableau Pulse mobile application, showing a dashboard titled "Today's Pulse" with a summary of device sales performance and a line chart for appliance sales. On the right is the Tableau desktop software, showing a map visualization where states are colored by total profit. A floating AI interface, labeled "Einstein", provides real-time feedback and suggestions for the visualization, such as "I've created a bar chart visualization showing the total profit for each state, sorted in descending order." and "I've updated the viz to a filled map, where each state is colored based on the total profit." The Tableau interface includes standard menu items like File, Data, Worksheet, Dashboard, Analysis, Map, Format, Help, and various data source and visualization controls.

Tableau  
Agent

Which Dashboard is  
the most important  
dashboard in  
a company ?



# Why KPI Dashboard is the most important ?

- Facilitate effective decision-making. KPI dashboards give a consolidated view of key performance metrics across the organization in one screen
- Promote accountability and transparency by clearly displaying progress towards goals and highlighting areas needing attention.

**Note:** KPIs should be regularly reviewed and adjusted to remain relevant as conditions change

What Are Your KPIs Really Measuring?, Harvard business review  
Key Performance Indicator (KPI) Definitions, Gartner

# Tableau Pulse

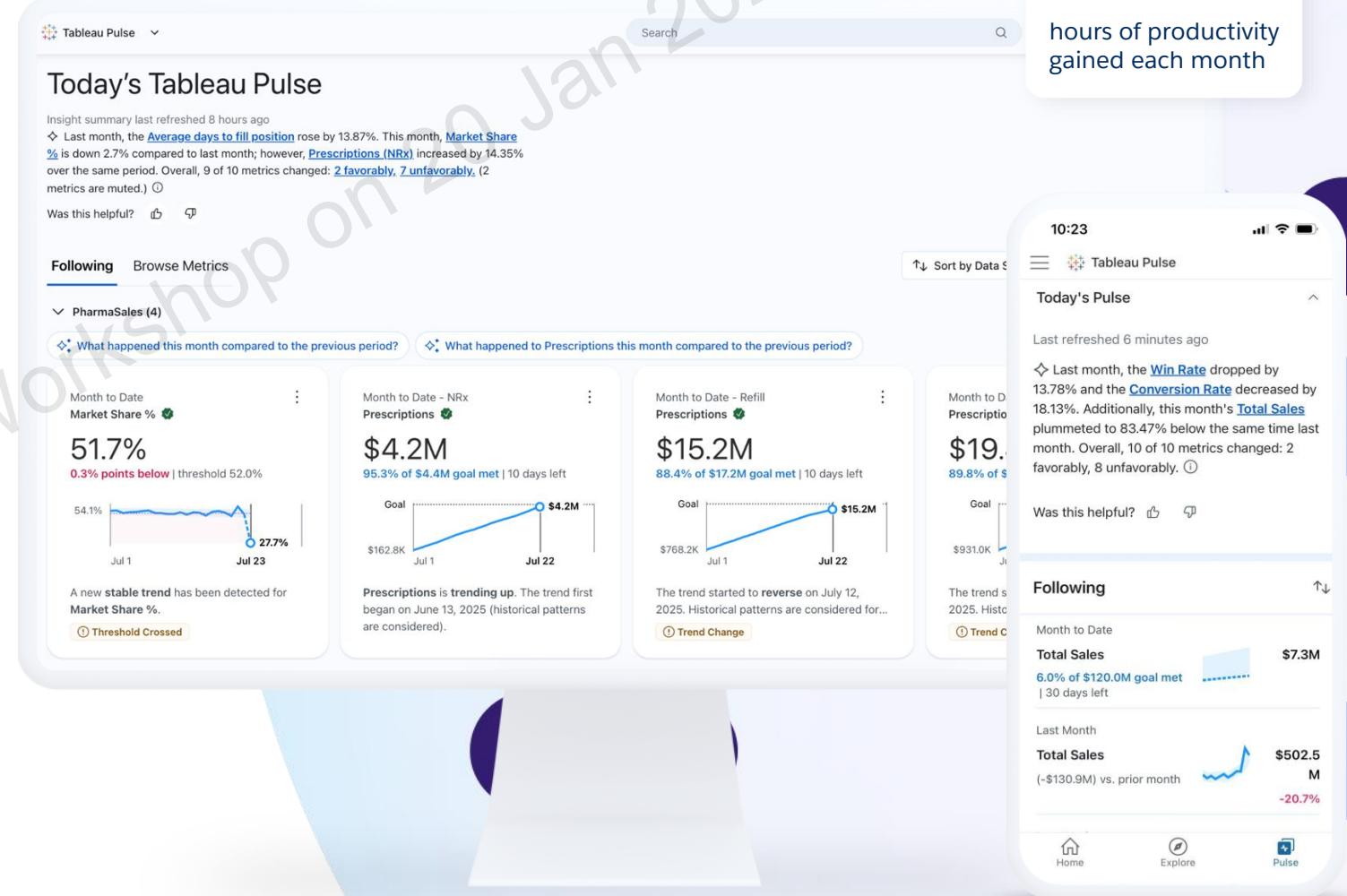
## Scale data-driven decisions with AI-powered insights

**Stay on top of your business** with personalized metrics and proactive insights in your flow of work

**Dig deeper into trends and insights** with guided exploration and natural language Q&A

**Gain trust in your data** with standardized, reusable metrics infused with your business context

GA | Now



The image displays the Tableau Pulse interface across three screens: a web browser, a mobile phone, and a tablet.

**Today's Tableau Pulse:**

- Summary:** Last month, the [Average days to fill position](#) rose by 13.87%. This month, [Market Share %](#) is down 2.7% compared to last month; however, [Prescriptions \(NRx\)](#) increased by 14.35% over the same period. Overall, 9 of 10 metrics changed: 2 favorably, 7 unfavorably. (2 metrics are muted.)
- Following Metrics:** PharmaSales (4) - [What happened this month compared to the previous period?](#) (Market Share %: 51.7%, 0.3% points below threshold 52.0%; Prescriptions NRx: \$4.2M, 95.3% of \$4.4M goal met; Refill Prescriptions: \$15.2M, 88.4% of \$17.2M goal met). [What happened to Prescriptions this month compared to the previous period?](#)
- Mobile App Preview:** Shows Today's Pulse with a refresh time of 6 minutes ago. Last month, the [Win Rate](#) dropped by 13.78% and the [Conversion Rate](#) decreased by 18.13%. Additionally, this month's [Total Sales](#) plummeted to 83.47% below the same time last month. Overall, 10 of 10 metrics changed: 2 favorably, 8 unfavorably.

# Pulse is designed for how business users want to work with data



## 1. Alert

Get updates on metrics in your flow of work



## 2. Understand

Find trends and discover the "why"



## 3. Explore

Dive deeper and find new insights



## 4. Follow-up

Ask questions in a conversational interface



## 5. Share

Collaborate and make data-driven decisions



# Get updates on metrics in your flow of work

**In Slack**

**In Teams**

**On the go**

**In dashboards**

**In email**

**On the go**

# Find trends and discover the “why”

Find trends in the data with the help of AI

## Today's Tableau Pulse

Insight summary last refreshed 20 hours ago

❖ The monthly [Transaction Comparable \(ratio\)](#) was notably high at 64.8 yesterday; however, the monthly [Average Order \\$](#) was low at \$14.44. Meanwhile, the monthly [Total Revenue](#) saw a modest increase, reaching \$7.4M yesterday. Overall, 6 of 6 metrics changed: [5 favorably](#), [1 unfavorably](#). (3 metrics are muted.) ⓘ

Was this helpful? ⌘ ⓘ

[Following](#) [Browse Metrics](#)

✓ Chain Restaurant Management (4)

❖ What happened this month compared to the previous period?



Compared to last month, **Average Wait Time (minutes)** increased by 0.39 minutes. Out of the 21 members of State, 18 increased. **Georgia, Utah, and Texas** increased...



Compared to last month, **Customer Satisfaction** decreased by 0.28. Out of the 34 members of Menu...

ⓘ Threshold Crossed

Sort by Data Source New Metric Definition

Month to Date  
Total Revenue ⓘ



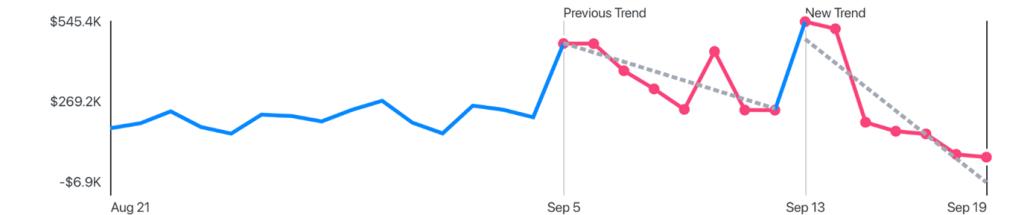
Bottom contributors by Menu Category are: **Chicken** with \$54.8K (1.0%), **Shake and Desserts** with \$299.3K...

ⓘ Trend Change

See when and where things changed

Top insight about this change | Does Total Revenue have a new trend?

⌚ The trend started to **steepen** on September 13, 2025. Historical patterns are considered for trends.



Was this helpful? ⌘ ⓘ



# Dive deeper and find new insights

Get an AI-powered overview of each metric



Dig deeper with on-demand filtering



# Ask questions in a conversational interface

Start with suggested questions

## Today's Tableau Pulse

Insight summary last refreshed 26 minutes ago

◊ The monthly [Transaction Comparable \(ratio\)](#) was notably high at 64.8 yesterday; however, the monthly [Average Order \\$](#) was low at \$14.44. Meanwhile, the monthly [Total Revenue](#) saw a modest increase, reaching \$7.4M yesterday. Overall, 6 of 6 metrics changed: [5 favorably](#), [1 unfavorably](#). (3 metrics are muted.) ⓘ

Was this helpful? ⤵ ⤶

Following Browse Metrics

▼ Chain Restaurant Management (5)

◊ What happened this month compared to the previous period?

Month to Date  
Average Order \$

\$37.65

+18.4% (+\$5.85) vs. prior period



The trend started to **steepen** on September 22, 2025. Historical patterns are considered for trends.

Month to Date  
Average Wait Time (minutes)

4.8

1.2 minutes (20%) below | threshold 6 min...



Compared to last month, **Average Wait Time (minutes)** increased by 0.11 minutes. **Northeast** decreased by 1.2 minutes and...

Search



Tableau Pulse Alerts (1)

↑↓ Sort by Data Source

New Metric Definition

Month to Date  
Customer Satisfaction

3.1

0.09 (3%) below | threshold 3.2

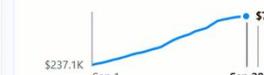


Compared to last month, **Customer Satisfaction** decreased by 0.13. Out of the ... ⓘ Threshold Crossed

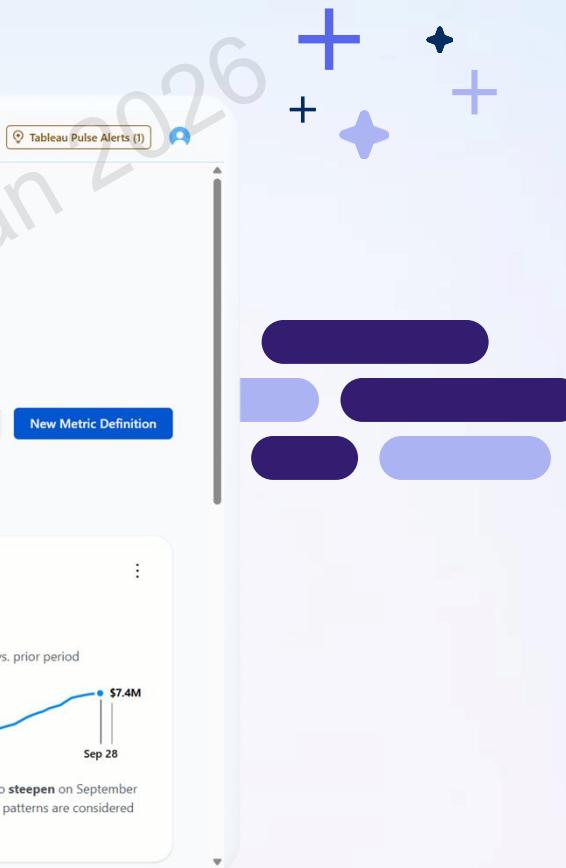
Month to Date  
Total Revenue

\$7.4M

+40.3% (+\$2.1M) vs. prior period



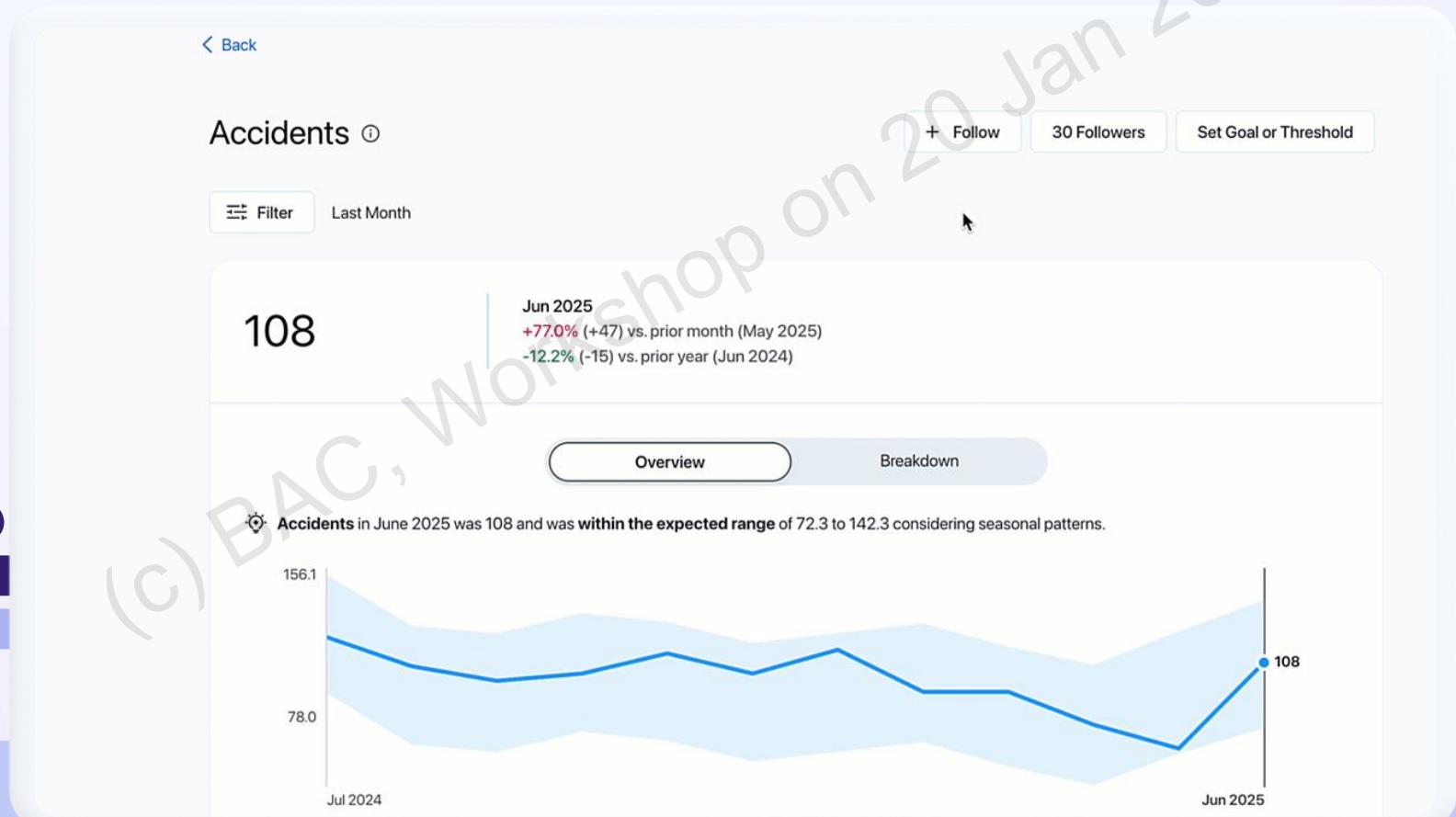
The trend started to **steepen** on September 22, 2025. Historical patterns are considered for trends.



Dig deeper with conversational exploration\*

# Collaborate and make data-driven decisions

Add team members to metrics to share insights



# Tableau Pulse delivers a reimagined data experience

Intelligent

Discover

Question | Call Center: What happened this month compared to the previous period?

❖ This month, the call center saw a 6.4% increase in **Avg Incoming Calls per Agent per Day** [1] and a 6.4% increase in **Incoming Calls** [2]. However, **Total Abandoned Calls** surged by 404.2% [3]. Additionally, **AHT Average Handle Time** increased by 6.5% [4] and **Avg Wait Time (s)** rose by 23.7% [5]. On a positive note, **CSAT - Customer Satisfaction** improved by 4.1% [6].

> Metric Sources (6)

Was this helpful?

❖ What caused the increase in Total Abandoned Calls?

❖ How can we further improve CSAT - Customer Satisfaction?

Question | Who can help me increase call volume?

❖ To increase call volume, you might want to look at agents like **Valentijn Lambdin**, **Gabriella Galliver**, and **Anabel Grebert** who had the highest increases in **Avg**

Ask a question

This tool uses generative AI, which can produce inaccurate or harmful responses. [Learn more](#)

Personalized

Today's Tableau Pulse

Insight summary last refreshed 13 seconds ago  
❖ The monthly **Total Abandoned Calls** reached a high of 87 yesterday. This month's **Avg Wait Time (s)** is 23.6% higher than the same time last month, while **Incoming Calls** is up 6.39% over last month. Overall, 6 of 6 metrics changed: **1 favorably, 3 unfavorably, 2 neutral or unspecified.**

Was this helpful?

Following Browse Metrics

↑ Sort by Data Source

▼ Call Center (6)

❖ What happened this month compared to the previous period?

Month to Date AHT Average Handle Time

319.9

+6.5% (+19.5) vs. prior period



Top contributors by Agent are: Brinna Colecrough (396.9 s), Gabriella Galliver (393.5 s), and Reta Winscum (342.9 s).

Month to Date Avg Incoming Calls per Agent per Day

68.6

+6.4% (+4.1) vs. prior period



Compared to last month, **Avg Incoming Calls per Agent per Day** increased by 4.1 calls per agent per day. Reinwald Louis...

Month to Date Avg Wait Time (s)

103.8

+23.7% (+19.9) vs. prior period



Compared to last month, **Avg Wait Time (s)** increased by 19.9 s. Out of the 6 members of **Call Reason**, 6 increased....

Contextual

Tableau Pulse

Today's Pulse

Insight summary last refreshed half a minute ago

❖ The monthly **Total Abandoned Calls** reached a high of 80 yesterday. This month, the **Incoming Calls** is up 1.13% compared to the same time last month, while the **Avg Wait Time (s)** is 26.14% higher than last month. Overall, 6 of 6 metrics changed: **1 favorably, 3 unfavorably, 2 neutral or unspecified.**

Was this helpful?

Following

Call Center

❖ Explore More

Month to Date

AHT Average Handle Time (+19.5) vs. prior period



319.9 +6.5%

Home

Explore

Pulse

# Tableau Pulse unlocks insights for every department



## Marketing Drive customer loyalty

Marketing Driven Pipe  
Customer Acquisition Cost  
Conversion Rate  
MQL to SQL Rate



## Sales Boost revenue & efficiency

Open Pipeline  
Win Rate  
Average Contract Value  
Customer Retention/Churn



## Service Elevate customer satisfaction

CSAT Scores  
# of Abandoned Calls  
Average Wait Time  
Average Resolution Time



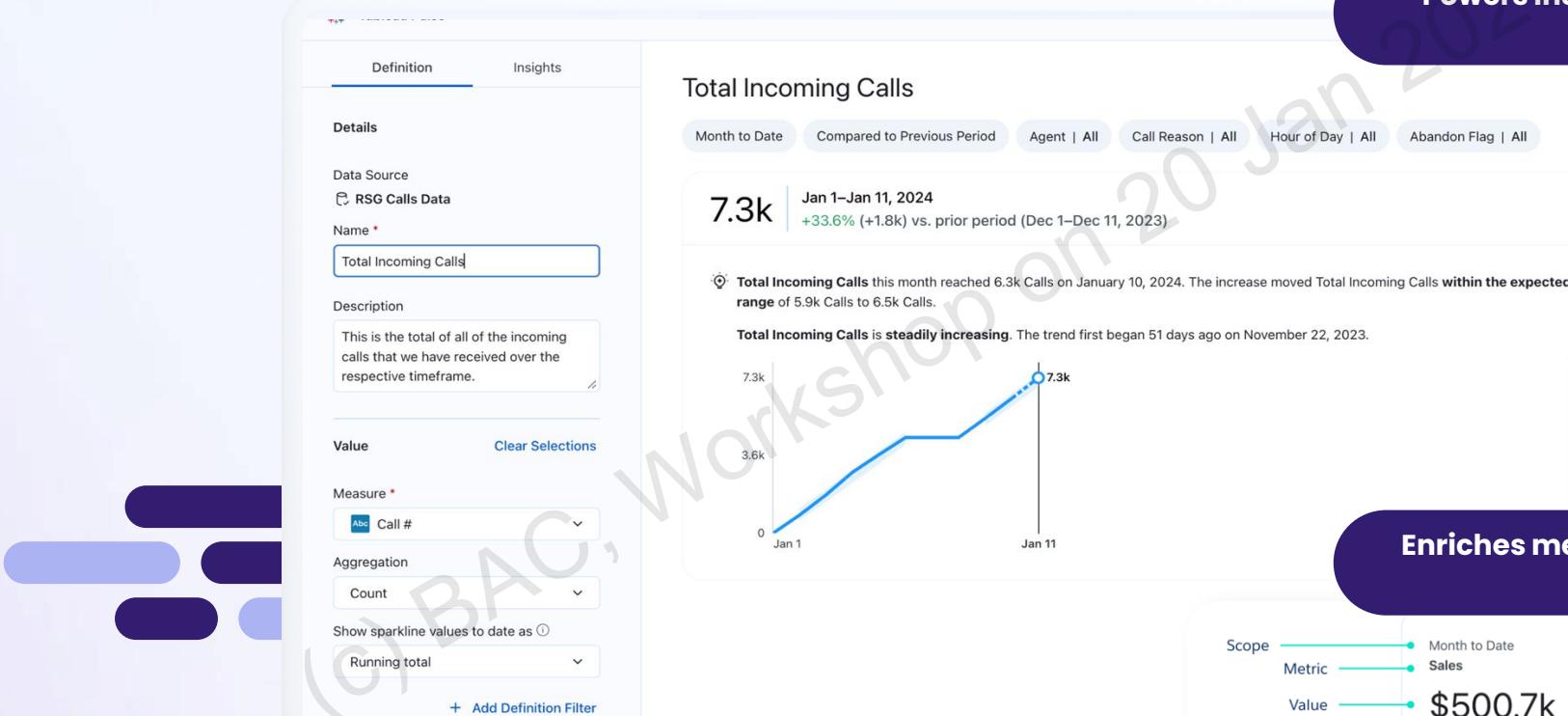
## Finance Increase bottom line

Total Revenue  
Gross Margin  
Operating Costs  
T&E Expenses

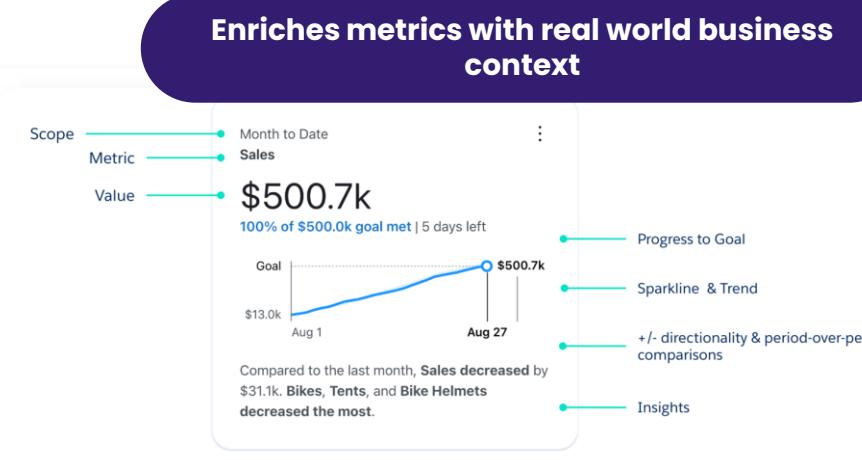
Actionable insights and personalised metrics in your flow of work – when and where you need them

# Tableau Pulse: Metrics Layer

Captures the details your business needs



Powers insights with standard metrics definitions



Enables reuse of metrics across use cases

# Components of the Pulse Metrics Layer

## Metric Definition

A scalable & manageable source of truth

**Measure & aggregation** define the metric's data.

**Time dimension & temporal level of detail** to track & filter the metric over time.

**Definitional filters** required for the metric to be right, e.g. closed\_won = True for "Bookings."

**Related dimensions** along which the metric can be meaningfully broken down.

**Additional metadata & relationships** like "up is good", or pointers to other metrics or analytics content to help contextualize the metric.

## Metric

An easy, understandable analytics artifact

**Metric value** provides users "the number" to orient on.

**Sparkline & trend** show how the metric is performing over time.

**Scope** across time period and cut by dimension.

**Insights** create scannable summaries for users.

**Actions** can be taken against that metric, integrated with the tools available across the portfolio.

# Tableau Pulse: Insights Platform

Contextual, personalized, and intelligent insights across apps

Creates automated,  
proactive questions

>Returns this month reached \$26.6k on August 26, 2024. The unexpected small increase moved Returns **below the expected range** of \$32.8k to \$36.3k, considering seasonal patterns.

The trend for **Returns** changed 4 days ago and is now **increasing at a slower rate**.



Discover Top Insights



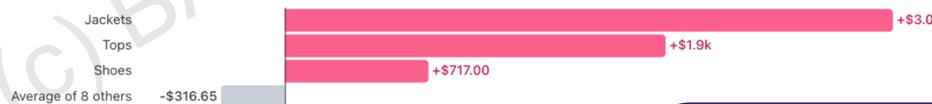
Which Subcategory had very high Returns?

Does Returns have a new trend?

Which Product Type decreased the most?

Top insight about this change | Which Subcategory increased the most?

Compared to the last month, Returns increased by \$3.1k. Jackets, Tops, and Shoes increased the most.



Automatically identifies drivers,  
trends, and outliers

Shows the where, when, and why



Today's Pulse

Last updated 5 hours ago

Device Sales is excelling, up 82.2% compared to the same week's progress last year. Last week, Inventory Fill Rate metric saw an impressive 29.6% increase. Overall, 5 of the 6 metrics we looked at have changed, 1 favorably. ⓘ

Following

Year to Date - In Progress +3 - P...  
Appliance Sales

980K

+30% (+230K) vs. prior period



Appliance Sales has seen an unusual

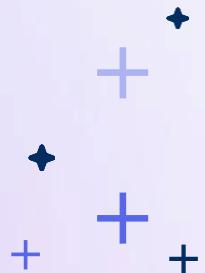
# Tableau Pulse: Capabilities by Edition & License Type

Editions	Capability	Viewer	Explorer	Creator
Standard & Enterprise Editions	Metrics Layer - Create metric definition		✓	✓
	Metric creation from Data Guide		✓	✓
	Lineage via Tableau Catalog		✓	✓
	Insights platform 	✓	✓	✓
	Insights summaries 	✓	✓	✓
	Insights & metrics in email, Slack, Teams, & mobile app	✓	✓	✓
	Custom calendar	✓	✓	✓
	Goals & Thresholds	✓	✓	✓
	Alerts	✓	✓	✓
	Global currencies & languages	✓	✓	✓
	Data-based actions on charts	✓	✓	✓
Tableau+ only	Enhanced Q&A 	✓	✓	✓
	Correlated insights 	✓	✓	✓
	Time-based forecasting 	✓	✓	✓

**Note:** This is not an intended to be an exhaustive list of all Pulse capabilities and features. However, it does list all Tableau+ exclusive features.

# Tableau Pulse Requirements

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# Data source requirements

## Published data source

- Live, Extract, Bridge, and Virtual Connections all supported

## Metric definition prerequisites

- A measure
- A time dimension
- At least one dimension column
- Standard English Column Name

# Data source requirements

- A single published data source. You can't connect to a data source that is embedded in a workbook, and you can't connect to multiple data sources or use data blending, unless you combine the data before publishing the data source.
- You have the Connect and View permission capabilities for the data source.

# Data source features requirements

- A measure to be aggregated as a sum, average, median, maximum, or minimum or a dimension to be aggregated as a count or count (distinct).
- A time dimension for the metric's time series. Tableau Pulse monitors data over time, so single point-in-time values won't produce a valid metric.
- At least one dimension that can be used to filter the data and insights.

# Naming Convention

- Use title-style capitalization rather than all caps.
- Use spaces rather than hyphens or underscores to separate words.
- Don't use special characters.
- Don't use Boolean fields that appear as true or false.
- Don't use fields that consist of IDs.

# Requirements for data source goals

- Goals can be static or user-defined
- Include the field that specifies the goal value as part of the data source that the definition connects to
- If you want a finer-grained goal to display when users apply dimensional filters on metrics, include that level of granularity in your goal data

# Recommended Dataset

A dimension (for drill-down or breakdown), should have low cardinality

Date Prefer Daily	Low-Cardinality		Metric-Based			
Date	Region	Product	Measure 1	Measure 2	Measure 3	Measure 4
2024-01-01	North	Product A	1,000	2,500	3,150	4,200
2024-01-01	Central	Product A	2,000	2,600	3,750	4,000
2024-01-01	South	Product A	3,000	2,700	4,250	3,800
2024-01-01	North	Product B	1,500	2,550	3,250	3,500
2024-01-01	Central	Product B	2,500	2,650	3,950	3,600
2024-01-01	South	Product B	3,500	2,750	4,450	3,950

# Metric Definitions Conclusion

## Basic definition prerequisites

- A measure
- A time dimension
- At least one filter (with low-cardinality recommended)
- Standard English column name

## Optional definition

- Definition filter
- Measure aggregation (Avg, Sum, Min, Max) / sparkline display adjustments
- Number format and unit expression
- Value up/down good/bad
- Goal

# WORKSHOP

## Introduction to Tableau Pulse

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# How to unlock maximum value from Tableau Pulse ?

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# Recommended Effective Data Sets

Data changes frequently

- Daily is ideal
- Daily insights need daily data
- Monthly or longer is less successful

Data must be lean and agile

- Large data sets lose relevance
- Data contains only key dimensions

# Baseline Metric

Baseline

Revenue

Time-Variant

Automated  
By Tableau Pulse

- Week to Date
- Month to Date
- Quarter to Date
- Year to Date
- VS Yesterday
- VS Last Week
- VS Last Month
- VS Last Quarter
- VS Last Year

Filtering  
Columns

Automated  
By Tableau Pulse

- By Product Group
- By Region/Area

# Composite Metric Super-Charging AI Tools

Composite metrics provide a more complete picture than single metrics.

They combine different factors, leading to better decisions, capture business complexity, reduce bias, and clearer communication of complex information.

Analysis Skill  
Needed



Time-Variant

- Week to Date
- Month to Date
- Quarter to Date
- Year to Date
- VS Yesterday
- VS Last Week
- VS Last Month
- VS Last Quarter
- VS Last Year

Automated  
By Tableau Pulse



Baseline

Revenue, Quantity, Order

Derived  
Metric

Rev. per Quantity = Revenue/Quantity  
Rev. per Order = Revenue/Order

Filtering  
Columns

Automated  
By Tableau Pulse

- By Product Group
- By Region/Area

# Critical Thinking / Design Thinking makes AI Tools more valuable.

Baseline

Revenue, Quantity, Order

Critical Thinking  
Needed



Derived Metric

Rev. per Quantity = Revenue/Quantity  
Rev. per Order = Revenue/Order

Polarity Balancing

Revenue – Cost = Profit  
% Profit = Profit / Revenue

Efficiency

Using Amount of Resource / Number of Staffs  
Revenue / Staffs, Revenue / Resource Utilization

Customer

Revenue / Customer  
Revenue / Customer Lifetime Value  
Revenue / Frequent Customer | One-Time Customer

Comparison

VS. Target / VS. Previous Year  
Revenue vs Target / Revenue vs Last Year + 10%

Peer Comparison

Ranking of Revenue within Peer (Dimension),  
Ratio of Revenue within (Dimension)

Time-Variant

- Week to Date
- Month to Date
- Quarter to Date
- Year to Date
- VS Yesterday
- VS Last Week
- VS Last Month
- VS Last Quarter
- VS Last Year

Automated  
By Tableau Pulse

Filtering  
Columns

Automated  
By Tableau AI

- By Product Group
- By Region/Area

# KPI Card Design

## Basket Size (Amount)

**Description :** The average amount a customer buys per transaction.

**Calculation :**

Total Sales Amount / Number of Transactions

**Supporting KPI:**

Conversion Rate, Traffic, Average Discount %, Return Rate, Gross Margin %

**KPI Ownership:**

Mr. AAA BBB

# KPI Card Design

## Basket Size (Amount)

### Increasing Meaning

Customers are buying **more value per visit**

Possible drivers: better bundling, upsell/cross-sell, premium mix, pricing increase, fewer discounts

### Decreasing Meaning

Customers are buying **less per visit**

Possible drivers: weaker merchandising, stock-outs in attach items, heavier discounting on low-priced SKUs.

### Action when High

- **Validate quality:** check **Gross Margin %** and **Return Rate** (avoid “high sales, low profit”)
- **Scale what works:** replicate bundles, recommendations, in-store scripts, PDP modules, checkout add-ons
- **Protect supply:** ensure availability of attach items and hero SKUs

### Action when Low

- **Find the break point:** category, store, channel, customer segment, campaign
- **Fix attach rate:** introduce bundles, “buy more save more”, add-on placement, checkout cross-sell
- **Check inventory:** stock-outs often kill basket growth (especially complementary SKUs)
- **Check price/discount strategy:** are you discounting the wrong products and shrinking spend?

# **WORKSHOP**

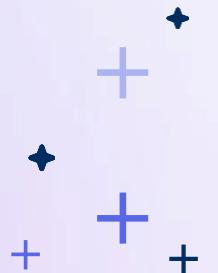
## **Critical Thinking**



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# Don't misunderstand Tableau Pulse

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**You are Tableau Pulse Expert**  
**You can do everything in**  
**Tableau Pulse**

How Tableau Pulse can help \_\_\_\_\_

# **How Tableau Pulse Help People Lose Weight ?**

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**From Bottom Up**  
**How can Tableau Pulse Help... ?**

**From Top Down**  
**How can Tableau Pulse Help... ?**

# Key Takeaway #1

- Tableau Pulse delivers insights faster and more consistently.
- Strong KPIs and reliable data foundation make those insights meaningful.
- Critical Thinking connects insights to actions

# Key Takeaway #2

**Outcome** set direction. **Process** is execution.

**People** need motivation,

and **Tool** helps monitor progress.

Everything starts with **data**.

**That's how AI creates real impact.**