

# Customer Success Grant - Tableau User Group

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## Grant Details

Goal of this document is to outline program details, grant requirements and any expectations of applicants that you can also use to prepare your application to request resources & support.

### What You Get

- Swag to support speakers and presenters
- Review of your program submission and provides guidance
- Structure for your program & tips based on previously successful implementations
- ... and more

### What You Gain

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## Today vs. Future State

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## Program Description

Tableau User Groups establish and improve communications within a community.

### Start a user group

By starting an Internal Tableau User Group, you will have the opportunity to connect users within your company. And generate enthusiasm among a group of people founded on the common cause of putting data at the center of every conversation. In order to support you, we've gathered some helpful tips as you begin the process of creating an internal Tableau User Group.

#### Everyone gets smarter

Developing Tableau champions within your organization means there is less dependence on one or two experts.

#### Networking

Being able to collaborate with other Tableau users can improve communication among teams and bring fresh

perspectives.

#### **Strength in numbers**

When data-minded people get together, often the realization is that more assistance is needed from IT or your Center of Excellence.

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## **How It Works**

### **Before your first meeting:**

#### **Step 1 - Identify leadership and appropriate support**

Some user groups create a board of leaders to support it. [Here](#) is a great example. If you want to bring together multiple offices, look into virtual conferencing options within your organization.

#### **Step 2 - Create an email alias**

Work with your IT team to determine who has a Tableau license and use this list as a starting point for invitations. Make sure to refresh this list on a regular basis.

#### **Step 3 - Talk to another leader**

[Our Tableau User Group Ambassadors](#) are waiting for you to reach out! Ask them for feedback on your agenda to see if there is anything they can recommend or suggest updating.

#### **Step 4 - Decide on meeting cadence**

We recommend coming together for an in-person or virtual Tableau User Group quarterly – some groups meet monthly!

Keep it consistent. For example, some groups meet on the third Thursday of every month. Send out calendar holds or setup recurring meeting invites.

### **Preparing for your first meeting:**

#### **Step 1 - Pick a meeting day**

Typically, we see Tuesday, Wednesday, or Thursday have the highest attendance rates.

#### **Step 2 - Draft an agenda**

The first meeting's agenda should focus on introducing the group, talking through goals and objectives and discussing with attendees what type of topics and content they would like to see in future meetings.

#### **Step 3 - Share the details**

Make sure people are prepping for your meeting. Share on your community page, internal communication tools, and send out calendar holds! Some groups test out a few different times during their first several meetings in order to see what works best for their community.

#### Step 4 - Select a meeting time

The most common timeframes for Internal Tableau User Groups are either a brown bag lunch option, or the second half of the day. Note: the longer you want your meeting to last the further in advance you should be sending calendar invites.

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## Program Example

Here is an example of an agenda for a 1-hour Tableau User Group meeting.

Topic	Description	Duration
Welcome/announcements	Welcome attendees and share announcements such as new help topics on the intranet, training sessions, etc.	10 min
Skill development	Select a topic to help attendees learn a new skill, such as product skills or demonstrate design best practices from internal or Tableau Public content.	15 min
Success story	Share an achievement that was made by using data.	10 min
New certified data sources	Highlight new certified data sources that have become available because one department's data can add context to another's.	5 min
Top content recognition	Showcase the top 10 dashboards in the company.	5 min
Open feedback	Allow time for open feedback and Q&A.	15 min
Total		60 min

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# Frequently Asked Questions

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## Link to Additional Information:

<https://www.tableau.com/community/toolkit/internal-tableau-user-groups>

## Grantor Contact Information:

If you have difficulty accessing the full announcement electronically, please contact: [ggani@tableau.com](mailto:ggani@tableau.com)

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### Resource Opportunity Number:

BP-20-007-TUG

### Posted Date:

August 4, 2020

### Resource Opportunity Title:

Tableau User Group

### Last Updated Date:

August 4, 2020

### Supporting Blueprint Pillar:

Community

### Original Closing Date for Applications:

December 31, 2020

### Subcategory:

Communication

### Current Closing Date for Applications:

December 31, 2020

### Opportunity Category:

Discretionary

### Funding Instrument Type:

Grant

### Category of Funding Activity:

Agility

### Cost Sharing or Matching Requirement:

No

### Expected Number of Awards:

10

### Application Required:

Yes

### Version:

Synopsis 1

### Blueprint Value Number(s):

1.005 - Programs to Establish & Improve Community  
Communication

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## Eligibility

### Eligible Applicants:

Others (see text field entitled "Additional Information on Eligibility" for clarification)

### Additional Information on Eligibility:

- CSM Support Customer Accounts