

# Customer Success Grant - Virtual Tableau Day

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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 request for resources & support.

### What You Get

- Presenters for breakout sessions or keynotes, upon request
- Support with your agenda development
- Prepackaged content and materials, including agendas and a choice of meeting format
- Award Package (see below, 'How It Works')

### What You Gain

- A virtual forum for new and current Tableau users to exchange ideas
- Tapping into the minds of Executives and Experts as they conduct your Roundtable conversations
- A platform to drive analytical messaging and share critical learning
- and, it's all done from a safe, social distance apart!

### Why You Should

- Virtual is our new normal - and everybody is doing it!
- You won't have to worry about CDC guidelines, or ensure everyone is wearing a mask
- You'll still be able to achieve all of the success Tableau Day brings to your attendees
- It's easier than planning an in-person event, and you won't have to wait for next year

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## Today vs. Future State

Today, there are two groups of people working from home... those who are currently using Tableau, and those who aren't. We look to bring together these two groups in one *virtual* location, so they can share ideas and critical learnings developed across the different businesses and silos in our organizations. The goal is to have a proliferation of information and to break down the barriers to sharing these important knowledge bases.

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## Program Description

What is a Tableau Day?

Tableau Days are company-hosted events that are great for nurturing relationships between different Tableau teams & users. Tableau provides speakers who lead the group through a demo, hands-on training, a Q&A, or other combinations of content. Tableau Days are good for engaging current Tableau users but should include attendance from non-users interested in learning how peers use Tableau, as well.

### **So, what's a *Virtual* Tableau Day?**

The same thing... online.

Virtual Tableau Days are company-hosted webinars, with the ability to nurture relationships between different Tableau teams and users. You will work with your CSM to coordinate speakers, who will lead your attendees through demos, workshops, a Q&A, and additional content. There is no limited space for seating, no concern about distance and masks. All of the challenges to having an in-person event, are removed!

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## **How It Works**

Someone from your organization will apply for the Virtual Tableau Day Customer Success Grant. Once it is approved, the planning can begin. As part of your Award Package, you'll receive a customizable Virtual Tableau Day Planner, walking you through every step. All pages of the planner may be edited to fit your exact needs. To ensure a high quality event we follow a defined 6-8 week process outlining key steps and responsibilities for planning a successful webinar. For larger more complex events, 10 weeks or more is needed. These details will be discussed during your first CSM meeting.

### **What we need from you:**

- Lead the event planning process, maybe even open your meeting by welcoming everyone to your event

- Use the Virtual Planner to organize your details. This will ensure your CSM is aware of your progress and can better support your efforts.

- Coordinate virtual speakers willing to share their unique use of Tableau or a new Tableau related idea that can be leveraged by others to drive value

- Email blast to attendees inviting them to Virtual Tableau Day and informing them of the Webex meeting time

### **The first meeting with the Tableau team will cover these tabs in your Planner:**

1. Goals
2. Checklist (which also serves as a timeline)
3. Target Audience
4. Agenda

You may notice these topics are already noted for you in the 'Planning Calls' tab, because we really have laid it all out for you!

## **Award Package**

- Virtual Tableau Day planner to ensure perfect execution - includes direction and details from securing your Webex number, to planning your Follow Up Campaign

- If appropriate, Tier II Tableau Swag and Give-aways

- If appropriate, GrubHub coupons in lieu of catering for your attendees

Webex and call-in number to host your webinar

## Getting Started

Click this link for more information on how to get started:

# Program Example

## Virtual Agenda Example

Here is an example of what your socially distanced Virtual Tableau Day agenda may look like. The event can also flex to a half day, or two day event, depending on your needs.

### Virtual Tableau Day Agenda

Use this space to create the Agenda for your Event. Consider things like the schedules of your Sponsor, and Keynote Speakers. Spread BIG ideas throughout the event, to ensure your guests stay online all day! Below are some suggestions. Feel free to edit this space to fit your virtual needs.

Date of Event		
Time Schedule	Activity	Description
10:30am-10:40 am	Sponsor Welcome	Executive Sponsor welcomes everyone to Virtual Tableau Day and gives mini motivational speech about how large of an impact Data Analytics has in this socially distanced world.
10:40am-11:10am	Featured Use Case Example 1	Cost Saving from Natalia Ramos in our Analytics Department. Learn how she was able to save 15% more after utilizing this Use Case in Tableau.
11:10am-12:00pm	Guest Speaker	Speaker discusses how they implemented data to grow their space.
12:00pm - 12:30pm	Trivia & Lunch & Break	Can feature an online interactive trivia game while folks enjoy meals provided through coupon codes or their own in-home meals, if appropriate.
... Planning Calls Communication Budget Goals Food Agenda Use-Cases Sponsor Landi ... + : ◀ ▶		

## Optional Additional Activities

The following are examples of microgrants that may be incorporated into your Virtual Tableau Day plans. Learning can ALWAYS be fun - even in your living room!

### Virtual Use Case Contest Microgrant (*Optional Add-on*)

This contest requires participants to complete a Use Case Form and submit it to a Judging Panel, made of up their peers. Once all submissions are in, a winner is chosen based off of who was able to produce the most value. You can have all types of use cases submitted, or you determine the theme, for example, most amount of money saved for the company, as criteria to submit a form. This will allow your attendees to have some fun AND provide a learning environment! More information is provided on our Customer Success Grant Website.'

### **Virtual Kahoot! Learning Games Microgrant (*Optional Add-on*)**

Kahoot IT turns trivia into a fun, learning environment, as your phone becomes your clicker! Host your own Kahoots game at your virtual conference, and watch the fun begin! Whether you have individual contestants, or break out into team groups, it is GAME ON - ONLINE! You can create your own game, or use one of the games provided. These trivia games are used by all types of people, in all types of industries and will add some good-hearted fun and learning to your Virtual Tableau Day! For more information on how to run your own virtual trivia game, visit our Customer Success Grant website.

### **Virtual Hackathon Microgrant (*Optional Add-on*)**

Let's get ready to RUMBLE!! When a team gets to collaborate and take every risk with no fear of defeat, there's no limit to what can be accomplished! This is a great way to break the ice between seasoned team members and newer team members, or people using Tableau vs. people who aren't yet using Tableau. Nothing else matters in a Virtual Hackathon other than how creative you can be and how much you want to WIN! Each winner, whether individually, or as part of a team, will be rewarded! We can help you choose a theme, or some ideas to make your Hackathon exciting! Check out the Virtual Hackathon Microgrant on our Customer Success Grant website for more information.

## **Marketing Example**

Examples of Virtual Tableau Day attendees tuning in to your event



# APPLY HERE

Click here to begin the application process for the Team Development Program Grant:

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## Frequently Asked Questions

1. **How do I start planning a Virtual Tableau Day?** You will get a Virtual Tableau Day planner that will walk you through the entire process of planning a successful Virtual Tableau Day.
  2. **What if I have a question that isn't answered in my Virtual Tableau Day Planner?** Your CSM will reach out to you to offer additional support as needed.
  3. **Do I need my own Webex account?** No, We will provide Webex details to host your event.
  4. **How many people should be on a Virtual Tableau Day planning team?** You can plan the event yourself, but we recommend having the support of your executive leadership in order to drive a successful event.
  5. **Do I need support of an executive sponsor?** Yes, the Tableau Day requires the support of an executive sponsor to be successful.
  6. **What's the hardest piece of planning & conducting a Tableau Day online?** Getting the use-cases and internal presenters is usually the most difficult task with planning a Tableau day. Operations during the actual Tableau Day are smooth and uneventful. Good planning requires that we have a dry run with Webex and all presenters sharing content to eliminate challenges during the event.
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### Link to Additional Information:

[https://help.tableau.com/current/blueprint/en-us/bp\\_internal\\_tableau\\_activities.htm](https://help.tableau.com/current/blueprint/en-us/bp_internal_tableau_activities.htm)

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#### Resource Opportunity Number:

BP-20-012-VTD

#### Posted Date:

August 25, 2020

#### Resource Opportunity Title:

Tableau Day

#### Last Updated Date:

October 23, 2020

#### Supporting Blueprint Pillar:

Community

#### Original Closing Date for Applications:

December 31, 2020

#### Subcategory:

#### Current Closing Date for Applications:

Communication

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:**

5

**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