

Customer Success Grant - Team Development Program

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

- Guidance on your program execution
- Defined program with workbooks, downloads and eLearning planned out
- Swag to reward your team's milestones
- Marketing and communication material
- Award Package (*see below, 'How It Works'*)

What You Gain

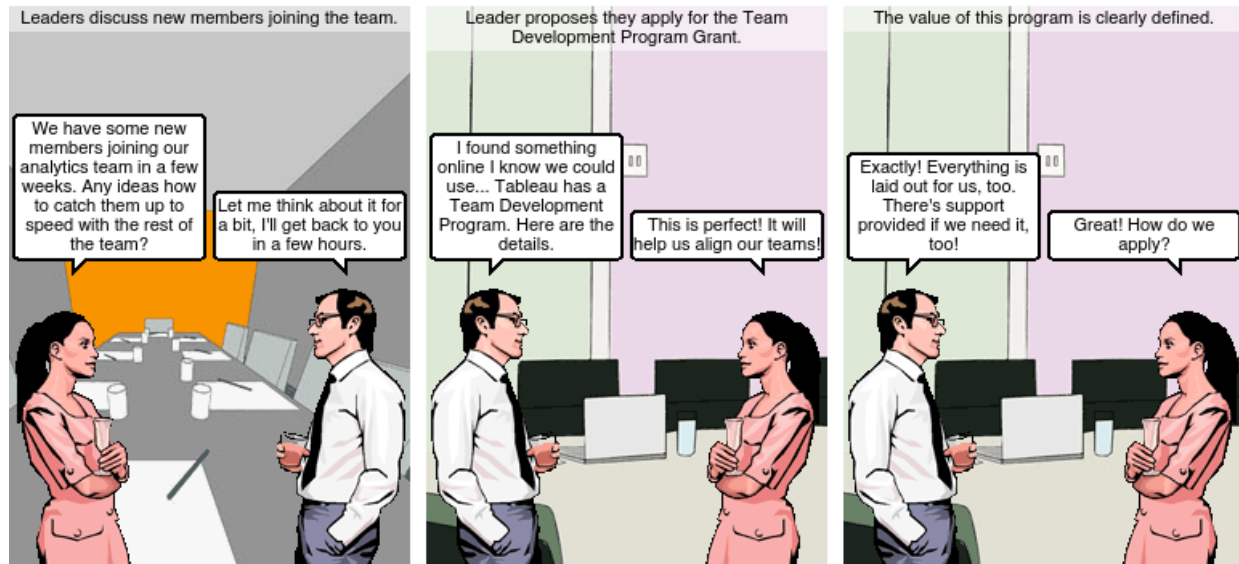
- Empowered individuals with analytical acumen
- Less time managing team progress and following up with team members to complete assignments
- Innovated perspectives during brainstorming sessions
- Support from veteran developers
- Structured plans for achieving Tableau certifications

Why You Should

- No more spending time micromanaging training
- Teams assume responsibility for their training and development
- Best practices foster the elevation of standards and procedures
- Establish a company culture where employees are invested in SUCCESS

Today vs. Future State

Today, you may have individuals on your team with different levels of development. There are seasoned members of your team who have the analytical acumen to dissect data into clear, simple concepts. Then, there are newer members, who have not yet had the same opportunities to gain the insight and experience to cohesively understand their dashboards. Wouldn't it be great if there was a program that solved this problem? That's when you should apply for the Team Development Grant!



Program Description

The Team Development Program Grant will sponsor any team who wants to foster a data and analytics culture for professional development. New team members complete a two week “Boot Camp” where they will gain additional training and information. Each member is then paired up with a veteran developer to support ongoing progress. Personalized development plans, complete with resources, such as eLearnings and Tableau Certifications will be provided. Members all participate in “Makeover Mondays” and periodically attend conference calls, where they can share their new skills and best practices with their peers.

How It Works

As a director, manager or team leader, you can create a professional development program for your teams that support your organization's goals and objectives. The program works for small teams and large organizations alike. Program proposals do not have to match our below examples. We provide the following examples to give you an out-of-the-box program that small teams can execute.

What we need from you:

- Assemble the group of “students” who will be taking eLearning courses and communicate that number with your CSM during your first meeting

- Lead the planning process, by utilizing the Acceleration Planner - everything is completely provided, just plug in names and dates that work with your schedule!

- Submit milestone updates to your CSM and track your progress throughout the execution of the Grant.

The first meeting with the Tableau team will cover:

- Number of eLearning participants

- Review of Acceleration Planner and plan to execute Grant Program

eLearning paths for your organization

Award Package

Team Development Acceleration Planner to ensure perfect execution - completely customizable, with planners and calendars to stay organized and reduce the amount of time you need to plan out the training process

Tier III and IV Tableau Swag, plus additions (Completion Certificates, etc.) for participants

Detailed outline of eLearning courses to design training plans (Both templated and customized layouts)

Templates to submit milestone progress updates to your Account Team

*Tableau Swag Tiers are based on dollar amounts, which will be awarded upon approval, and distributed upon completion.

Getting Started

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

Program Example

Here is an example of how this program can benefit an organization. Please be creative when submitting your application and detail how you would like to structure your own program and how we can best support you.

Jason Schwartz (Manager, GGG Corporation)

Jason has created a development program for his team's analytical proficiency. He on-boards new team members by asking them to participate in a 10-day "Boot Camp" and assigns them to a veteran developer on his team, as their mentor.

Each person on Jason's team has their own personalized development plan that includes eLearnings and completing Tableau Certifications. Team members also compete in weekly "Makeover Mondays" where they discuss their approaches and share best practices they've learned on team conference calls.

Jason sees the Team Development Program and wants to apply for a Blueprint Grant. This is how he will encourage and reward his team at certain milestones of their development. Jason writes a Grant Application, detailing the process he uses and how it ties into the goals of his organization; he submits the application. Through the approval process, we worked with Jason to create a reporting process on his team's progress and show how it generates value against the larger organization goals.

A micro-grant was awarded to Jason's team that included rewards of 5 Tableau branded screen cleaners, 5 Tableau t-shirts, and 1 "The Big Book of Dashboards." The grant requires Jason to document milestones achieved by his team and collect 1 use-case per quarter on how his team generated value to their organization, using the skills they acquired. We have added an incentive clause that awards a "Big Book of Dashboards" for the team members who create the largest value use-case using their analytical acumen.

To date, Jason has recorded his team has all started their eLearning training, and two have passed their Tableau Certifications! Jason has also submitted three use-cases using the template provided to him. The quality of those use-cases was very high because Jason was able to use the template as a progress reporting mechanism, in order to maintain Grant compliance.

Jason's CSM schedules a midway pop-in conversation to monitor progress and offer additional support for this program. This ensures Jason gets the support he and his team require to be successful.

Training Program Example - Beginner Level

Here is an example of how the Team Development Program may be utilized for someone early in their analytics career and development. This example shows how the two week Boot Camp schedule kicks off the onboarding process.



Example of Beginner Ongoing Training and Development throughout Onboarding Process

	Day 11	Day 12	Day 13	Day 14	Day 15
Week 3	Attend Makeover Monday	One on One with Veteran Partner to discuss Personalized Development Plan	Listen in on Team Call to discuss Makeover Monday contributions	Analytics Roundtable Discussion	Practice using new skills

Week 3 Development to be Completed

- Veteran Partner One-on-One (2 hours)
 - Review Veteran's notes and adjust Personalized Development Plan accordingly
- Attend Weekly Makeover Mondays
- Listen in on Team Calls where veterans discuss Makeover Monday contributions
- Attend Analytics Roundtable Session

Ongoing Development to be Completed

- WEEKLY - Attend Makeover Mondays with Veteran
 - Veteran decides which contributions should be shared on Team Calls
- WEEKLY - Attend Team Calls where veterans discuss Makeover Monday contributions
- WEEKLY - Attend Analytics Roundtable Session
- MONTHLY - Review Personalized Development Plan with Veteran and notate strengths and opportunities

Example of Development Program - Experienced Level

Here is an example of how the Team Development Program may be utilized for someone who is more advanced in their analytics career, and is seeking additional development, or training. Because this person may have other responsibilities, the program is flexible to fit their scheduling challenges.

Jason's Explorer Self-service Analytics Boot Camp					
Experienced Level - pursuing further development					
	Day 1	Day 2	Day 3	Day 4	Day 5
Week 1	Introduction to Boot Camp Training, Overview of Program, Meet with Partner to design Personal Development Plan	Getting Started with Tableau Desktop - Complete Module 1-3	Exploring Developer Resources - Complete Modules 1 and 2	Exploring Developer Resources - Complete Module 3 and 4	Seamless Integration with Embedded Analytics - Complete Module 1

SEPTEMBER						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
30-Aug	31-Aug	1-Sep	2-Sep	3-Sep	4-Sep	5-Sep
	Meeting 12pm		Day 1 - Analytics Boot Camp	Team Mtg 9am	Day 2 - Analytics Boot Camp	
6-Sep	7-Sep	8-Sep	9-Sep	10-Sep	11-Sep	12-Sep
	Meeting 9am		Day 3 - Analytics Boot Camp			
13-Sep	4-Sep	15-Sep	16-Sep	17-Sep	18-Sep	19-Sep
		Day 4 - Analytics Boot Camp	Meeting 10 am	Day 5 - Analytics Boot Camp	Tableau Skills Assessment	
20-Sep	21-Sep	22-Sep	23-Sep	24-Sep	25-Sep	26-Sep
	Makeover Monday 10am					
27-Sep	28-Sep	29-Sep	30-Sep	1-Oct	2-Oct	3-Oct

Marketing Example



Onboarding Welcome Email Examples

Insert Boot Camp email with details and links to local resources

APPLY HERE

Click [here](#) to begin the application process for the Team Development Program Grant:

Frequently Asked Questions

1. **What is a use-case?** A documented use of value driven by Tableau Analytics
2. **Can I choose my Swag?** Yes, you can chose your own swag to reward your teams. Note that there are funding limits which may results in adjustments of swag before your proposal is fully approved.
3. **Who is the right audience for this program?** Any team leader whether your team has only two people on it or whether your team consists of hundreds of people.

4. **Do I need access to eLearning to participate?** No, you can utilize whatever learning system or process you like. Just include in your proposal what learning platform you would like to use and what steps you will require to measure and monitor progress.
5. **What type of training will my team have access to?** eLearning are paid, free training videos are also available but eLearning is strongly recommended.
6. **Can I make changes to this program?** Yes, these are examples to guide you or for you to use out of the box.

Link to Additional Information

eLearning Samples: <https://elearning-samples.tableau.com/>

Resource Opportunity Number:

BP-TDP-20-003

Posted Date:

August 3, 2020

Resource Opportunity Title:

Team Development Program

Last Updated Date:

September 25, 2020

Supporting Blueprint Pillar:

Proficiency

Original Closing Date for Applications:

December 31, 2020

Subcategory:

Development

Current Closing Date for Applications:

December 31, 2020

Opportunity Category:

Discretionary

Funding Instrument Type:

Grant

Category of Funding Activity:

Proficiency

Cost Sharing or Matching Requirement:

No

Expected Number of Awards:

500

Application Required:

Yes

Version:

Synopsis 1

Blueprint Value Number(s):

1.002 -- Programs to Increase Proficiency

Eligibility

Eligible Applicants:

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

Additional Information on Eligibility:

- CSM Support Customer Accounts