Customer Success Grant - Community Doctor 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

> FAQ solutions to users within your organization
>
> Time with Tableau Specialists
>
> Structure for your program and useful Best Practices
>
> Award Package (see below '*How It Works*')
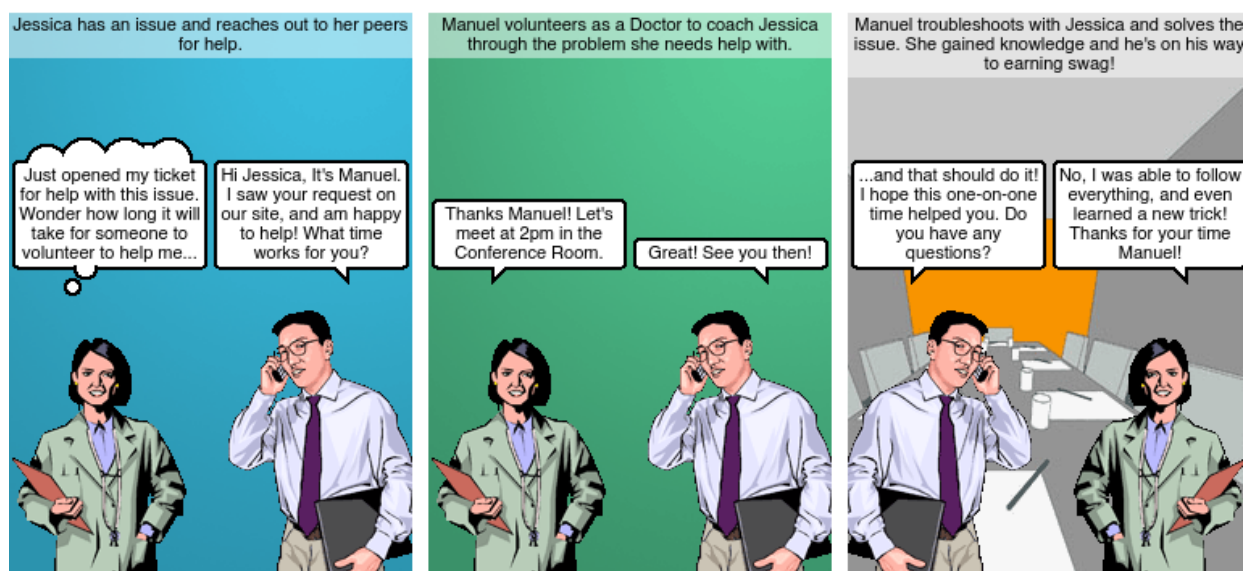
What You Gain

> Tableau professionals coaching your best Doctors
>
> A solutions network & peer to peer coaching
>
> Fast remedies to the most common "ailments"
>
> Processes in place for future conditions
>
> Ongoing support from Tableau Specialists, as needed
>
> and more!

Why You Should

> Guaranteed solutions to your unresolved issues
>
> Resolution in a short time-frame
>
> Networking opportunity for team members
>
> Empowers "patients" to seek solutions on their own
>
> Builds confidence/bragging rights for "Doctors"

Today vs. Future State

Today, if you run into a hiccup, you search online for simple remedies, or you ask others for advice. What happens if you don't find anyone with a solution? Would a 30 minute meeting with an expert provide a solution? That's when you should call in the Tableau Community Doctor Program! Whenever you find yourself in that exact situation, you will be able to log your request and have an experienced "Doctor" diagnose your concerns, and help "cure" your problem.

Jessica has an issue and reaches out to her peers for help.

Just opened my ticket for help with this issue. Wonder how long it will take for someone to volunteer to help me...

Hi Jessica, It's Manuel. I saw your request on our site, and am happy to help! What time works for you?

Manuel volunteers as a Doctor to coach Jessica through the problem she needs help with.

Thanks Manuel! Let's meet at 2pm in the Conference Room.

Great! See you then!

Manuel troubleshoots with Jessica and solves the issue. She gained knowledge and he's on his way to earning swag!

...and that should do it! I hope this one-on-one time helped you. Do you have any questions?

No, I was able to follow everything, and even learned a new trick! Thanks for your time Manuel!

Program Description

The Community Doctor Program is for any organization seeking to foster a peer driven **Data Culture**, by removing roadblocks and expanding the use of Tableau within their organization. You'll be able to identify individual, departmental, and organizational knowledge gaps. The Program will also develop a network to self-service Tableau visualization and data challenges and will result in an environment that fosters innovation. Don't worry - if the Volunteer Doctors cannot resolve the issue, a Tableau Specialist will jump in. Your issue will be resolved and your team members will gain exposure to how it was done!

Volunteer Doctor Program
Tableau users can submit their Tableau problem ticket to our central page. Another Tableau user sees a problem they know the solution to, can then signup to resolve that ticket's specific issue. They can schedule up to 30 minutes to resolve that issue, which they record on our value submission form.

How It Works

This grant program allows you to modify the experience to best fit your organization. Some customers choose to offer only pre-scheduled appointments, some only ad-hoc and some a combination of both. Other customers organize their Data Doctor practice around a theme in order to raise organizational competency around visualization best practices, performance optimization, or calculations competency, for example.

Your Data Doctor practice can offer free form appointment topics, where any question or issue can be discussed, or can be themed to a specific appointment topic.

Free form Data Doctor allows any patient to bring any question or issue they have to your practice. This method is a great way to get a pulse for all the different types of issues that are occurring within your organization and collect data that can be used to identify knowledge gaps later on. In the present, it will also mean you need to find a way to match

patients with Doctors who have the skills to help them. Though you can do this in an office hours format, pre-scheduling makes the process easier.

What we need from you:

Utilize the Acceleration Planner to organize your efforts

Recruit volunteers to be Data Doctors

Design your Practice based on the level of experience of your Patients

Award Package:

Acceleration Planner to ensure perfect execution and planning of your Practice by outlining every step and detail for you, from recruiting volunteers to the technology you will need

Tiers II, III and IV Tableau Swag, plus additions specific to this Program to reward Data Doctors

Swag is awarded based on number of tickets each Doctor completes. Details are in the Acceleration Planner document.

Network of experts in the field as Doctors to provide support to your "patients" and volunteers

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

Program Example

Scenario 1 - Ask for Help: Jessica, Tableau Developer, BBB Company,
Jessica is working on a project and runs into a problem. She has spent some time on this, and there's no solution in sight. She knows her company applied for the Tableau Community Doctor Program and logs on to their central page. She opens a ticket, signaling a Volunteer Doctor to help resolve her issue.

Manuel, a subject matter expert, volunteers 30 minutes of his time to sit with Jessica, and discuss the roadblocks she encountered. He coaches her through his decisions, and next time, this issue won't stand in Jessica's way! Manuel completes a value submissions form, and is on his way to earning some Tableau swag!

Scenario 2 - Provide Help: Oliver, Tableau Developer, BBB Company
Oliver has volunteered to help with a problem another team member is having. After their 30 minute consultation, Oliver doesn't have the answers he hoped for. Now what? Oliver has the opportunity to reach out to a Tableau Specialist. Together, they resolve the issue and the Specialist checks in with Oliver every few days to monitor his progress.

Marketing Examples

We are looking for volunteers to help us start a Tableau doctor program.

We can provide you with appreciation awards, as well as Tableau swag for those

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APPLY HERE

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

Frequently Asked Questions

1. **How do I know if I'd make a good volunteer Doctor?** Anyone that has the answer to a submitted question would be a great doctor. Just spend 30 minutes with someone solving their problem and documenting the results.

2. **When do we reward doctors?** At the halfway mark & closeout process of the grant. Like an arcade, we want as much time as possible to get enough tickets for a prize. We build in two check-ins to reward doctors trading in their tickets.

3. **What prizes / swag can we use to reward doctors?** Any, the largest swag reserved for the full-time doctors that complete the most tickets. We want to stretch our prizes as far as they can go.

4. **Can doctors get more than one prize?** We are currently limiting doctors to one prize per grant cycle

5. **Can the entire sum be awarded to one person? Are there limits on how much one person can receive?** The program is intended to reward many doctors that assist the program and should be structured in a way to maximize the program budget and receive the most value from doctors for the funding allocated. While it is perfectly ok to award a doctor a higher value swag item or perhaps even pair up two swag items together, we also need to explain what the doctor did in order to justify receiving recognition. Program funding is good for one year and a new grant would be required to fund an additional program year.

6. **Do we need to cap the call to a specific time limit?** Yes, doctors are only working on bite sized issues. I would only reward doctors for each value write-up they submit and call that 30 minutes of help. To reward additional time would be an incentive for our doctors to continue to support the team and act as a consultant which we do not want. We want to reward doctors in a similar way to the insurance industry, $ for each visit or code filled out. It is up to the doctor to find the most efficient means of supporting their patient.

7. **What if a customer still needs help?** Then they can kick the ticket up to the Tableau team. We have the ability to support tickets that exhaust the internal resources of the team. We have Specialists who can tackle tickets and provide needed resolution to tough problems. We can even discuss augmenting the team with additional resources in order to achieve specific project milestones or tasks.

8. **Do we need to keep the session to one topic?** Yes, doctors may only offer support in their one field. It is ok for someone to return with the same dashboard and a new topic. However we ultimately want to monitor the program for repeat offenders that frequent the service with the same dashboard. The team may benefit from considering an augmented team member to support that project/dashboard.

9. **Do we need doctor to fill out the value form?** Yes, that will be used to inform internal leaders on what technologies people are using, where they are having trouble, any emerging trends coming out. It also informs us of the value the program is driving and the unlocked human potential that we drove with our program. Collecting value submissions also is required by our compliance policies governing the program, and are in place to ensure we do not create the perception of quid pro quo.

10. **How do we distribute swag globally?** Please contact your CSM regarding swag. We can send a box of swag to you and can ship anywhere you need the swag to go. We ideally want for there to exist a closeout process approving documentation showing that the doctors performed value driven work. Once reviewed, the final required amount for rewards will be determined and reduced from the program budget. Then a box of swag can be sent to your central program leader or regional lead for distribution.

11. **Where do we go to see new swag?** https://www.bdasites.com/tableau/Main/Default

12. **How do we decide how much for the grant?** Please feel free to shop, this is a fun experience. Imagine what you would want to receive as a doctor, from the program to working on other people's problems. We want to include

a note from our executive sponsor as a thank you which has a lot of value in itself. We want to pair with an internal HR recognition program and use a combination of the three to reward doctors. Then we should come up with an amount of value submissions required to achieve our highest level and work down from there. Here is an example reward structure...

Link to Additional Information:

https://www.tableau.com/community/toolkit/data-doctor

Resource Opportunity Number:

BP-CDP-20-001

Resource Opportunity Title:

Community Doctor Program

Supporting Blueprint Pillar:

Community

Subcategory:

Support

Opportunity Category:

Discretionary

Category of Funding Activity:

Community

Expected Number of Awards:

10

Version:

Synopsis 1

Blueprint Value Number(s):

1.001- Community Programs to Improve support of Tableau Workbook Development

Posted Date:

July 24, 2020

Last Updated Date:

July 29, 2020

Original Closing Date for Applications:

December 31, 2020

Current Closing Date for Applications:

December 31, 2020

Funding Instrument Type:

Grant

Cost Sharing or Matching Requirement:

No

Application Required:

Yes

Eligibility

Eligible Applicants:

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

Additional Information on Eligibility:

CSM Support Customer Accounts