

# Customer Success Grant - Team Development Program

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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

- Review of your program submission
- Guidance on your program execution
- Defined program with workbooks, downloads and eLearnings
- Swag to reward your team's milestones
- Marketing and communication material
- Templates to submit progress updates to Tableau
- ...and more!

### What You Gain

- Empowered individuals with analytical acumen
- Innovated perspectives during brainstorming sessions
- Support from veteran developers
- Structured plans for achieving Tableau certifications

### Why You Should

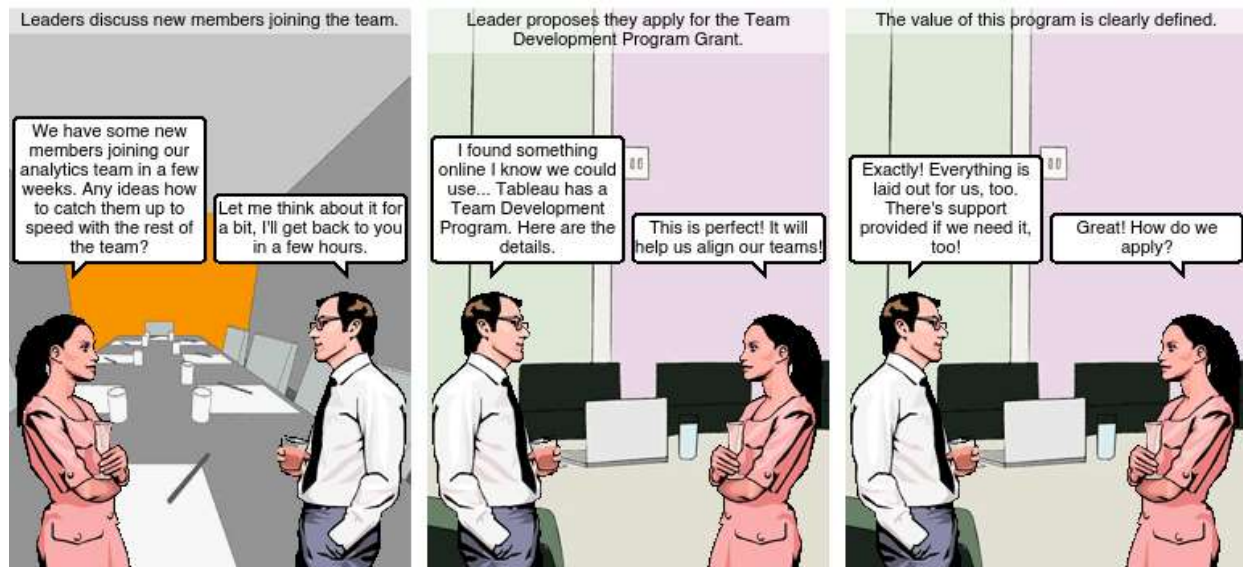
- Teams are held accountable for their performance
- Teams assume responsibility for their training and development
- Best practices foster the elevation of standards and procedures
- Teams require less supervision
- Establish a company culture where employees are invested in SUCCESS

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## 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!



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## 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.

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## 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 below examples to give you an out-of-the-box program that small teams can execute.

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## 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.

| Jason's Boot Camp Training Schedule         |  |   |   |   |
|---|--|---|---|---|
| Beginner Level - requiring more development |  |   |   |   |
|   | Day 1  | Day 2   | Day 3   | Day 4   |
| Week 1                                      | Introduction and Overview of Boot Camp Training Program, Meet with Veteran Partner | 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      |
|   | Day 6  | Day 7   | Day 8   | Day 9   |
| Week 2                                      | Seamless Integration with Embedded Analytics - Complete Module 2                   | Seamless Integration with Embedded Analytics - Complete Modules 3 and 4 | Integrating Features and Optimizing Functionality - Complete Module 1 | Integrating Features and Optimizing Functionality - Complete Module 2 |
|   |  |   |   | Developer Skills Assessment   |
|   | Day 10   |   |   |   |

#### Week 1 Training to be Completed:

- Visual Design Boot Camp
  - o Day 1 (5 hours)
    - Introduction to Boot Camp Training
    - Overview of Program
    - Meet with Veteran Partner
    - Create Personalized Development Plan
  - o Day 2 (4 hours)
    - Getting Started with Tableau Desktop - Modules 1, 2, 3
    - Review Key Takeaways with Partner (15 minutes)
    - Partner takes notes on progress and prepares for one-on-ones
  - o Day 3 (4 hours)
    - Exploring Developer Resources - Modules 1 and 2
    - Review Key Takeaways with Partner (15 minutes)
    - Partner takes notes on progress and prepares for one-on-ones
  - o Day 4 (4 hours)
    - Exploring Developer Resources - Modules 3 and 4
    - Review Key Takeaways with Partner (15 minutes)
    - Partner takes notes on progress and prepares for one-on-ones
  - o Day 5 (4 hours)
    - Seamless Integration with Embedded Analytics - Module 1
    - Review Key Takeaways with Partner (15 minutes)
    - Partner takes notes on progress and prepares for one-on-ones

#### Week 2 Training to be Completed

- Visual Design Boot Camp
  - o Day 6 (4 hours)
    - Seamless Integration with Embedded Analytics - Module 2
    - Review Key Takeaways with Partner (15 minutes)
    - Partner takes notes on progress and prepares for one-on-ones
  - o Day 7 (4 hours)
    - Seamless Integration with Embedded Analytics - Modules 3 and 4
    - Review Key Takeaways with Partner (15 minutes)
    - Partner takes notes on progress and prepares for one-on-ones
  - o Day 8 (4 hours)
    - Integrating Features and Optimizing Functionality - Complete Module 1
    - Review Key Takeaways with Partner (15 minutes)
    - Partner takes notes on progress and prepares for one-on-ones
  - o Day 9 (4 hours)
    - Integrating Features and Optimizing Functionality - Complete Module 2
    - Review Key Takeaways with Partner (15 minutes)
    - Partner takes notes on progress and prepares for one-on-ones
  - o Day 10 (2 hours)
    - Complete Developer Skills Assessment

### 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)
  - o 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
  - o 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

Thank You Rewards

We can provide you with appreciation awards, as well as Tableau swag for those who participate in your program. Below are some examples of the rewards provided to support the Team Development Program.

#### Examples of Swag Choices

- Welcome Swag
  - Button
  - Sticker
  - etc..
- Complete Pathway Swag
  - Button
  - Sticker
  - Cleaning Pad
  - Phone Knob
  - etc...
- Complete Certification Swag
  - Water Bottle
  - Coffee Mug
  - etc...
- Complete Major Analytics Project & Documented Value Swag
  - T-shirts
  - Hats
  - etc...
- Successful Program Swag
  - Big Book of Dashboard
  - Tableau for Dummies
  - Art + Data Book
  - etc..

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## 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.

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### Link to Additional Information

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

### 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-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

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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