Workflow optimization in **Tableau** involves streamlining how data is accessed, transformed, visualized, and shared to improve efficiency, performance, and maintainability. Here are the key **Workflow Optimization steps** in Tableau:

**🔁 1. Define Clear Objectives**

* **Know your goal**: What question are you answering or business problem are you solving?
* Helps reduce unnecessary steps and focus on relevant data.

**🧹 2. Clean & Prepare Data (Upstream if Possible)**

* Use **Tableau Prep** or your source system (SQL, etc.) to:
  + Remove nulls or duplicates
  + Standardized formats
  + Filter unnecessary data early (e.g., date ranges)
* Benefit: Lighter data → faster dashboards

**🧠 3. Optimize Data Source Usage**

* Use **Extracts (.hyper files)** instead of live connections when possible.
* Reduce size of extracts:
  + Only needed columns and rows
  + Filter at extract level
* Use **aggregated extracts** when possible.

**📐 4. Efficient Calculations & Fields**

* Avoid row-level calculations where aggregations would suffice.
* Use LOD (Level of Detail) expressions wisely — they’re powerful but can slow performance if overused.
* Pre-calculate values in source data or Tableau Prep if they don’t need to be dynamic.

**🧩 5. Design Smarter Dashboards**

* Use fewer visualizations per dashboard.
* Limit use of complex charts like maps or high-cardinality filters.
* Use **container layouts** for responsiveness and cleaner design.
* Minimize use of custom shapes/images that increase load time.

**🔧 6. Performance Optimization**

* Use the **Performance Recorder** to identify bottlenecks.
* Reduce use of:
  + Quick filters (especially multiple values or wildcard filters)
  + High-cardinality dimensions
  + Nested calculations
* Leverage **context filters** to improve filter performance.

**🗃️ 7. Organize and Document**

* Use clear naming for fields, sheets, and dashboards.
* Document calculations and workflow steps (annotations, tooltips).
* Helps with team collaboration and future maintenance.

**📤 8. Publish & Share Wisely**

* Publish to Tableau Server or Tableau Cloud with proper data source scheduling.
* Use **subscriptions**, alerts, and embedded views strategically.
* Set user permissions appropriately to reduce overhead.