

Client Issue

Our client, an integrated media and entertainment company, was utilizing Tableau internally with over 300 users. The client was experiencing challenges that stemmed from a lack of standardized processes, lack of governance, lack of monitoring, and the client required an overall strategy to enhance the ability for the users to work within Tableau effectively.

Additionally, Tableau had not been upgraded in a number of years and the users were looking for additional functionality offered by the newer versions. All work, both UAT and production, was produced and managed in the production environment further complicating the performance issues.

The Business Intelligence team was working to solve the problems, but required external intervention. Users were complaining about overall performance issues and the technology team had challenges with security issues that provided too many rights to a number of the users. Additionally, all of the user licenses were assigned, yet management was confident that not all users were active.

Client Challenge Details:

- The production environment was being utilized for both production needs and UAT
- There was a lack of workbook management causing users to be unclear of the current versions of workbooks to access and utilize
- Best practices had not been established
- Performance issues existed
- Upgrade was needed
- No desire to increase the number of users

Our Solution

We began with a kickoff meeting to establish a clear and comprehensive understanding of the issues. We met with the various departments from Marketing to Finance in order to identify any challenges that had not been noted. Upon completing the interviews, we created an overarching scope document to guide the project.

The Tableau dashboard was built in order to create visibility for leadership and specifically identified usage per user as well as usage per workbook. Through these actions, we were able to identify a number of users that were inactive allowing for reassignment of the licenses and avoiding the client needing to purchase additional licenses. We standardized processes and worked with the team to ensure their viability and effectiveness. Governance was established removing the security issues that were identified. Common use data sources were moved from the production environment to the Tableau Server in order to reduce the load and increase performance as well as provide a single source that was continuously updated for user satisfaction and effectiveness.

Ultimately, we separated the UAT environment from the Production environment to allow ease of testing without the burden on production resources. Monitoring (TabMon) was added to monitor server utilization and alerts were established in order to combat performance issues. We optimized the overall tableau environment working the Business Intelligence team and also established a Center of Excellence for them to remain high functioning.

Key Benefits

The client was pleased with the outcome of the project and realized many benefits as a result of the project.

- Tableau upgraded offering key functionality requested by the users
- Production performance increased by nearly 20% TPS (Transactions per second)
- Moving common/essential workbooks to the Tableau server increased user satisfaction and overall reliability of the data (due to centralization and continuous updating)
- Standardized processes allowed for greater reliability
- Best practices were created and shared across the organization to drive better results for the users
- The Center of Excellence was created to ensure continuous improvement
- Number of concurrent users was increased due to the project (processes, governance, monitoring, server load and more contributed to better performance)
- Client was able to add users without increasing costs.

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