

All Things Tableau at Dreamforce

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Speaker E - 8.41%

Speaker F - 10.4%

Notes:

- Tableau. We're talking about Pulse for Salesforce and tableau Einstein. These innovations are transforming data analytics and enhancing how businesses interact with data in real time. Welcome.

- Tableau pulse puts data at your fingertips, wherever you are. It can be on your mobile phone or push notification or an email. Tableau pulse suggests other questions or other ways you should be looking at the data. One amazing customer putting tableau to work.

- Anya Ahern, director of visualization and democratization from Blue Shield of California.

Bailey Ferrari, senior manager of solution engineering at Tableau. How do you think this is gonna change the game for analysts?

- A lot of the things in our healthcare system are just broken. Anything that can empower a physician or a care manager to really meet them where they're at is really going to change how people experience healthcare. Hopefully improve health outcomes and also reduce costs.

- What are three things someone can do to get started with tableau today and start leveraging these AI features like tableau agent? Be curious if you're not ready to go there, find a specific user group that's willing to test out this trusted KPI.

- Sean Miller shares his datafam guide to success in navigating the AI era. Get hands on, join up with the AI and tableau user group and sign up for the Dailyfam weekly roundup blog.

Speaker A

00:00:00

Tableau. We're talking, uh, cutting edge advancements like Pulse for Salesforce and tableau Einstein. These innovations are transforming data analytics and enhancing how businesses interact with data in real time. My name is Bailey Ferrari and I lead a solution engineering team at Tableau. And I'm joined by Karen Madera, a senior product marketing manager at Salesforce and Zohir Karu, VP of data analytics at ah, Blue Shield of California. Welcome. I can't.

Speaker B

00:00:25

Thank you.

Speaker C

00:00:25

You're here, we're excited.

Speaker A

00:00:27

We've got to start with the big news. Karen, Tableau agent, how do you see the connection between agents and analytics and.

Speaker C

00:00:33

Tableau, of course, so broadly throughout of Dreamforce we've been hearing about agent force, the realization of AI. So bringing humans and autonomous agents together is game changing. What we're seeing for companies is that implementing AI out of the box and seeing value immediately is going to be huge, not only for their revenue generating programs, but also for enhancing the customer experience coming from tableau. Of course, we've been laser focused on shifting the paradigm of visual analytics for 20 plus

years. Now with agent force is another key moment in our innovation. With agent force, with data cloud and with the Salesforce platform, uh, agentic analytics is going to change the industry.

Speaker A

00:01:21

I could not agree more. And the innovation doesn't stop there, of course. I mean, come on, Tableau Einstein. With the introduction of Tableau Einstein, how do you think business businesses can pivot? Like what can they achieve now that they couldn't do before?

Speaker C

00:01:34

Absolutely. So I'm so excited. We've been working on Tableau Einstein for a while now and always our north star has been how do we make data driven work more efficient all around for everyone? So now, um, with all of our innovations that we've been bringing to the market, like tableau pulse, tableau agent and data cloud, agent force, it's all coming together to make that a reality. Um, what we've been hearing from customers is that yes, we love data, but we're struggling time and time again to actually see the value and take action on that data. What tableau Einstein is going to do is make insights and data second nature to use for everyone where they work, within the Salesforce platform and in their business critical apps. So super excited to bring that to market and have customers really use it.

Speaker A

00:02:25

Absolutely. And speaking of talking to customers, Zohar, I can't wait to get your perspective. What's your reaction to autonomous agents in the healthcare space?

Speaker D

00:02:33

There's definitely a lot of excitement around agents. Uh, there's a lot of manual work that happens in the world of healthcare time that is taken away from delivering care to members. Uh, and so if we can streamline that in any way, and agents sound like a fantastic opportunity to be able to do that, I think there's a huge opportunity. The only thing we'll have to be cautious of, of course, is we can't have automatic or automated health decisions being made of. We still need humans in the loop or humans at the helm to oversee those decisions. But I am sure there's a lot of efficiencies that could be gained.

Speaker A

00:03:06

Absolutely. And when we're talking about autonomous agents, of course, the next question, or the thing that comes to mind on my end, is tableau pulse. I mean, you're a vp of analytics and data. How do you see pulse transforming the way that you can actually do business?

Look, in general, data is not supposed to be used to just check a decision. It should be used to make your decision. And to make your decision, you need the information at your fingertips, wherever you are. And tableau pulse is a, uh, fantastic vehicle to put that information right where you need it. You know, it can, you know, whether that's on your mobile phone or push notification or an email or whatever else, so that you can quickly see the information that you need, the metrics you care about. And also, tableau pulse suggests other questions or other ways you should be looking at the data as well to give you additional insights. And that is very powerful for a business user who may not be completely technically savvy, but still has these questions in their mind and doesn't want to have to figure out how to navigate a very complex dashboard to try to answer them. Tableau pulse makes it easy.

Speaker E

00:04:05

So I'm going to wear the, uh, hat of a marketing manager. As a marketing manager, what do you need to know? You've got to make sure your reviews and CSAT score is always high. And how do I do that? I use pulse for that. So every day I have my pulse metric that I keep looking at saying how my CSAT scores are. By the way, this is real stuff. Like, as an engineering leader, I look at my pulse metrics every day on how my team is behaving. Ryan looks at it every day for everything that sales is happening on a daily basis. So pulse gives the metrics to me. Now, I look at this metrics, and gosh, there's something bad happening here. My CSAT score has taken a, uh, nosedive there. Let's go into the breakdown. Pulse automatically categorizes all the dimensions here, I can look at age category by department. Shipping and handling is in trouble. Maybe let me look at the regions. As you can see, central is doing well. East is kind of not doing so great. But this is a snapshot what really would be helpful for me if I really know what changed. So, again, pulse lets me ask any question. So I'm going to ask a question on maybe which region decreased the most. Let's ask that question. As you can see, it created this.

Speaker D

00:05:16

Ooh.

Speaker E

00:05:16

Voila.

Speaker A

00:05:17

Now let's hear from one amazing customer putting tableau to work. My name is Bailey Ferrari, and I am a m senior manager of solution engineering here at Tableau. And I am joined by Anya Ahern, a passionate community member and director of visualization and democratization from Blue Shield of California. Anya, uh, I'm so excited to have you. It is so exciting to be here with you today.

Super excited to be here, Bailey. Thank you so much.

Speaker A

00:05:38

Tell me more. Tell me about the journey that blue Shield California has had with tableau.

Speaker B

00:05:41

Oh, my goodness. Well, I think our journey started way back in 2016, and everything was very legacy. And on prem, we had these disparate systems, and slowly we've been evolving to move to the cloud with all our data sources and get just a single, unified version of the truth. And now I'm super excited that tableau cloud is part of that journey, and, um, really excited to implement some of the amazing features that I've seen so far. And I'm hoping and saw it, the keynote, right so much. It's a whole new world out there for tableau.

Speaker A

00:06:08

Oh, my gosh. It really is. And of course, I mean, we can't talk about all the new things without talking about tableau. Agent, tell me what you think. How do you think this is gonna change the game for analysts?

Speaker B

00:06:16

Yeah, I am super happy with my little agent buddies. I mean, I feel like they're there to help me do some of the most mundane things. And I really have so much empathy for the users and them just wanting to ask a question and get the answer with data and be able to take an actionable insight. Me not having to be there, being a bottleneck to answering all those questions for them, is going to be a game changer, right? They don't have to stop what they're doing. Go onto Tableau's server, hunt for a dashboard. Maybe it has the answer right in natural language. They can type in an answer, they can type in a question and just get an answer in the context and flow of how they're doing their work and just move on. Empowered with that data to make decisions?

Speaker A

00:06:55

Absolutely. I think it's really bridging that gap between exploratory analysis and explanatory analysis. Not only do they have to consume those pre built dashboards, but they can ask those next questions in a way that makes that barrier to entry just much, much lower. So I'm so excited that you're as excited about it as I am.

Speaker B

00:07:10

No, I see it as moving from. We had descriptive analytics and then predictive, but now it's really the prescriptive analytics, empowering people to do what they need to do.

Well said. So well said. So let's talk more about examples in the healthcare sector. What do you see? How's that going to help? How's it going to change things?

Speaker B

00:07:24

Yeah, I mean, I honestly think a lot of the things in our healthcare system are just broken. And so I really see this as a way to know as much as possible about the members that we are trying to serve and have all the data at our fingertips to meet them where they're at. I think of the care that my 19 year old son, who is in college, needs, versus the care that my mom with severe dementia and mobility issues needs. And anything that can empower a physician or a care manager to really meet them where they're at or proactively remind them to take preventative measures or take their medicine, is really going to change how people experience healthcare and hopefully improve health outcomes and also reduce costs.

Speaker A

00:08:05

I love that. I love that. What are three things that you think someone can do to get started with tableau today and start leveraging these AI features like tableau agent?

Speaker B

00:08:13

Yeah. Oh, my God. Just three of these.

Speaker A

00:08:14

I know. Okay. You can do more. You can do more.

Speaker B

00:08:15

Yeah. Um, I'm excited to just be curious. I've been talking at the conference to a lot of people, and they're not even using tableau pulse yet. And when I think about all the time saving that it can be for me, I don't need to do formatting. I can have a couple clicks on a dashboard that's beautifully formatted and responsive and already ready for mobile, is just there. Be curious if you're not ready to go there, find a specific user group that's willing to test out this trusted KPI. Um, and then I'm really excited, too, in this concept of the workspaces, where everyone throughout the value chain of building a data product is present literally on one canvas, and we're all talking the same data language. We have this unified semantic model. And with that comes the trust and the governance and the lineage. And that enables us to be able to literally put little bits and bobs of tableau everywhere across our entire ecosystem. Right. And it's out in that marketplace. And other people can leverage it. They don't need to reinvent the wheel or have sandboxes. Um, so being able to take advantage of those miniature data products and be able to just embed them as a new visual language in every touch point that our data consumers are interacting in is just going to be amazing. Be curious and start kicking the tires. I know my

tableau community. They're going to break it and then they're going to make it better.

Speaker A

00:09:39

That's what I love the most about. Tell us what the problem is, we'll fix it. But no, you hit on a really compelling point, which I find at Dreamforce as well, which is there's so many people that are in just different stages of their journey. Some people are totally, totally new to tableau. So even more broadly, how did you get started? How do you recommend they get started just in tableau, period?

Speaker B

00:09:57

Yeah, you know, I think when you're coming to a new product, it's always scary. And you see these folks out in the community that are wizards that know everything about it, but they all started there too. The tableau community was started probably in the early 2010s by just the sweetest, most amazing people, like Joe Mako and Jonathan Drummy and Kelly Martin, and they just gave their time and the community is still about that. And as Tableau has grown and evolved from a desktop product to the amazing Einstein product it is now, there's literally something for everyone. So if you're not into desktop design, you're into server or you're into automation, there is a group, there are your people out there. And now looking at these workspaces and all the integration I want to bring in the communities of Salesforce, I literally want a muley as my bestie because I want to integrate all the things with APIs. There's just something for everyone. Don't be scared, just get out there and meet your data fam.

Speaker A

00:10:52

Yes, I love it. We have time for one last question all day. So you're a community visionary and of one of my idols. So I'm fan girling a little bit. But how has the tableau community helped you prepare and really embrace autonomous agents in this era that we're in?

Speaker B

00:11:08

Yeah, I mean, it's super exciting. I do think there is a lot of fear. Like how is this going to where do I end? And AI, uh, take over. And we think of ourselves as data artists. We've really spent our time honing the craft of data visualization and storytelling. Um, but I think this concept of this assistive, you know, language helping us has been there all along. When I think, you know, the first, I put the blue pill on the rows and the green pill on the columns. It's not a table of data, it's a bar chart. From the very beginning, tableau has been suggesting ways to help you better visualize and communicate with data, you know, and then we evolved to have things like ask the ask data lens where you could publish a data source and people could, you know, just ask questions of the data source, and then this is just the next evolution. And so I'm just really excited, especially to see how the community uses the marketplace and the things that people build and that we can learn

and grow from each other.

Speaker A

00:11:58

Amazing. Well, anya, uh, you are incredible. Thank you so much for everything that you're doing to do well and do good in the world. And, yeah, you're just awesome. Thank you.

Speaker B

00:12:05

Thank you so much for having me. M of course, tableau is awesome.

Speaker A

00:12:08

If you would like to get hands on with tableau, scan the QR code on your screen for a free tableau trial. Or of course, if you're not into scanning QR codes, you can head to the link tableau.com/products/trial hello data fam.

Speaker F

00:12:21

My name is Sean Miller. You might know me as hipster Vizninja on YouTube as a three time tableau visionary, the Kansas City tableau user group leader and social ambassador. I am so excited to be here at Dreamforce with all of you and share my datafam guide to success in navigating the AI era. Number one, get hands on. I've learned so much by just getting my hands on the tools and learning as I go. My custom AI plus tableau trail mix on trailhead is a great place to start. It will help you understand how generative AI enhances your analytics. And it's worth 8000 points. But not that I'm counting. Number two, learning with a like minded community has helped me a ton, and finding these people is easy. With tableau user groups covering all regions, industries and subjects and occurring on a monthly basis, you can find people that will support your data learning journey and share best practices. And number three, this one's my favorite. I saved the best for last, the Datafam Roundup blog. If you're looking for inspiration, uh, to see what's possible with tableau. This weekly blog keeps you up to date with all of everything that's happening in the community and prepares you for all of the latest innovations. I personally like to see how the community continuously, every single week, pushes the boundaries of what tableau is capable of. So there you have it. That's my roadmap for datafam success. Get started on your data journey by following these three links. First, take my tableau plus AI trail mix. Second, join up with the AI and tableau user group. And number three, be sure to sign up for the Dailyfam weekly roundup blog.