The Data Culture Playbook

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Put data at the center of every decision.

Transform your business by fostering a Data Culture.

With the emergence of AI, excitement around data has never been higher. But how can your company leverage data to generate insights and make fast business decisions? It starts by building a strong data culture.

If you want to drive business growth with data, this playbook will help you unify your data sources and embed data analytics into every aspect of company culture, empowering every member of your team to overcome the most complex business challenges.

Data has the potential to transform your business. When you promote data-driven decision making at every level, you can anticipate business trends, deploy resources efficiently, and maximize revenues by equipping your teams with the insights they need to make better and faster decisions. And it all starts with connecting people with unified data.

74% of business leaders believe data reduces uncertainty.

60% of businesses reported that employee training would support their data-driven goals.

36% said they use enterprise-wide training on data literacy and data-driven decision making.

75% agreed that if more organizations consistently leveraged analytics to make data-driven decisions, they would achieve significant revenue gains.

April 2023, Forbes Insights Data to Decision Making Survey, in partnership with Tableau and Deloitte Digital

The rise of AI has brought new attention to the value of data and reminds us that businesses need to cultivate a mindset that supports data culture—a shared mission to put data at the heart of every decision. Companies now feel the importance of analytics, and urgently want to unlock insights and become data-driven. Of course, the importance of data is not new—data-driven businesses have always been top performers, but with the widespread adoption of AI, businesses that adopt a data culture will be able to generate insights quickly, innovate faster, and drive unprecedented growth.

Executives, who use and understand the power of data, share the same behaviors and mindset:

83%
of CEOs want
a data-driven
organization

87%
of CXOs prioritize
becoming an
intelligent enterprise

74%
of leaders
require data in
decision making

IDC Whitepaper, Sponsored by Tableau, How Data Culture Fuels Business Value in Data-Driven Organizations, May 2021

Creating a data culture may seem daunting, even in the best of times. It takes a commitment from every level of the organization to influence how people think about and act on data insights. But the good news is, you can take incremental steps to build these capabilities now, knowing that the action you take has a monumental impact: You'll be able to execute and scale analytics and business strategies, unlocking your data's value in the near and long term.

Are you leading with data?
Find out by asking team members these questions:
- Do people know how to interpret data?
- Can people get help from colleagues with analytics or data-related questions?
- Do we give people access to the data they need?
- Are people accountable for the data they access and create?
- Do we require data to support decisions?

Want to take the first steps towards building a data culture? Start with data literacy.

How to use this playbook.

This playbook lays out a simple, but effective roadmap for building a data culture. It contains five chapters, each with a specific focus area.

For each area, we outline how to make it happen–recommendations on how to build, run, and when you're ready, expand and mature these capabilities.

Keep in mind that a data culture isn't linear–it's a way of leading and working that continuously evolves. We urge you to take a phased approach that makes sense for your business's goals and needs. The steps in this playbook can be executed and repeated, as a data culture comes to life and after it is thriving.

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Chapter 1

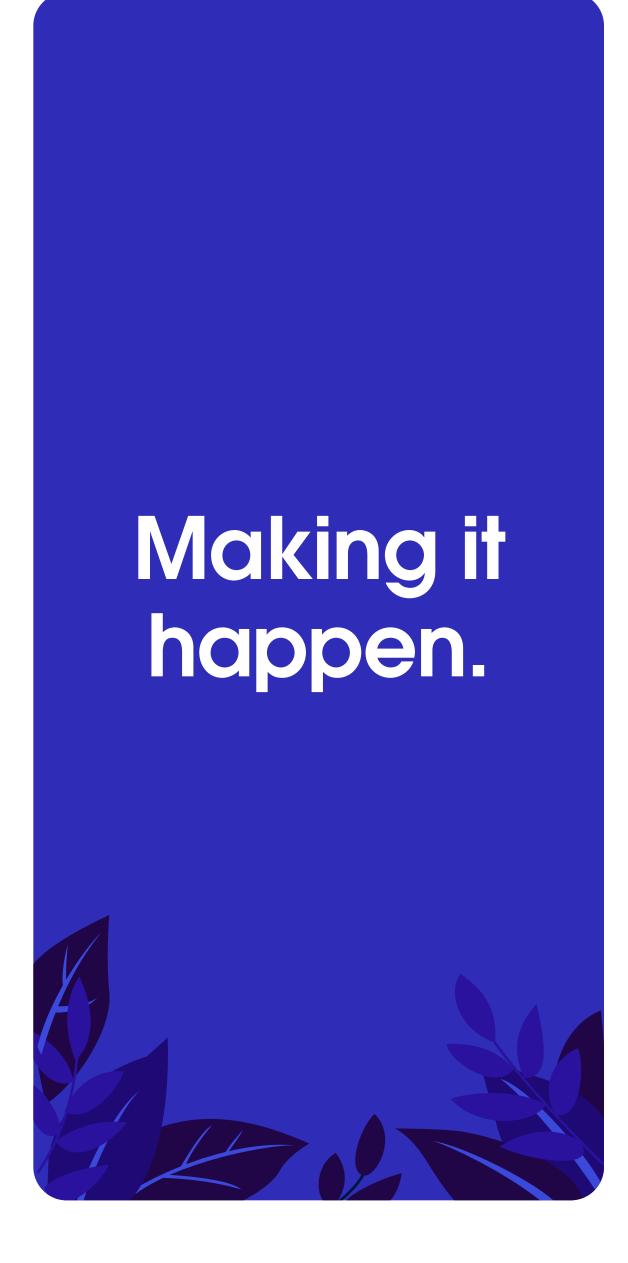# Define and align key data metrics across your company.

Goal

Appoint leaders from various teams and functions who determine where to focus data resources. They align on business goals and strategic objectives for the organization.

What it looks like

Assign data resources to areas with the biggest impact. Assess and re-evaluate key priorities as conditions shift, keeping long-term goals in sight. Start with an audit of organization-wide data use, reviewing the current state against strategic initiatives, desired outcomes, and priorities. To understand how your business is performing against priorities, create a key set of metrics and work with an analyst team to locate, create, and align data sources to support these metrics. These sources are updated on a regular basis so your leaders can define expectations on how a metric should perform.

Making it happen.

Build

Create a data leadership community. Assemble a team of stakeholders across your business and analytics functions to execute strategy and drive growth with data.

Prioritize higher value business issues. Deploy analytics to target areas where data-driven transformation will create the most profound impact.

Identify key guiding metrics to monitor the health of the business. To make the process more manageable, limit the number of guiding metrics to ten or less.

Run

Support business leaders with guiding metrics. Foster a shared single source of truth with visualizations and high-level data sources to support fast internal communication and swift decision making across your company.

Empower business leaders to monitor performance. Compare forecasts against historical performance to drive business growth.

Track metrics to identify and resolve business challenges. Offer constant visibility of data metrics to help your business leaders and teams work together to identify trends and resolve issues quickly.

Expand

Identify urgent and high-potential projects. Decide when to deploy resources towards promising projects, and when to withhold resources from efforts that are no longer serving your company's needs.
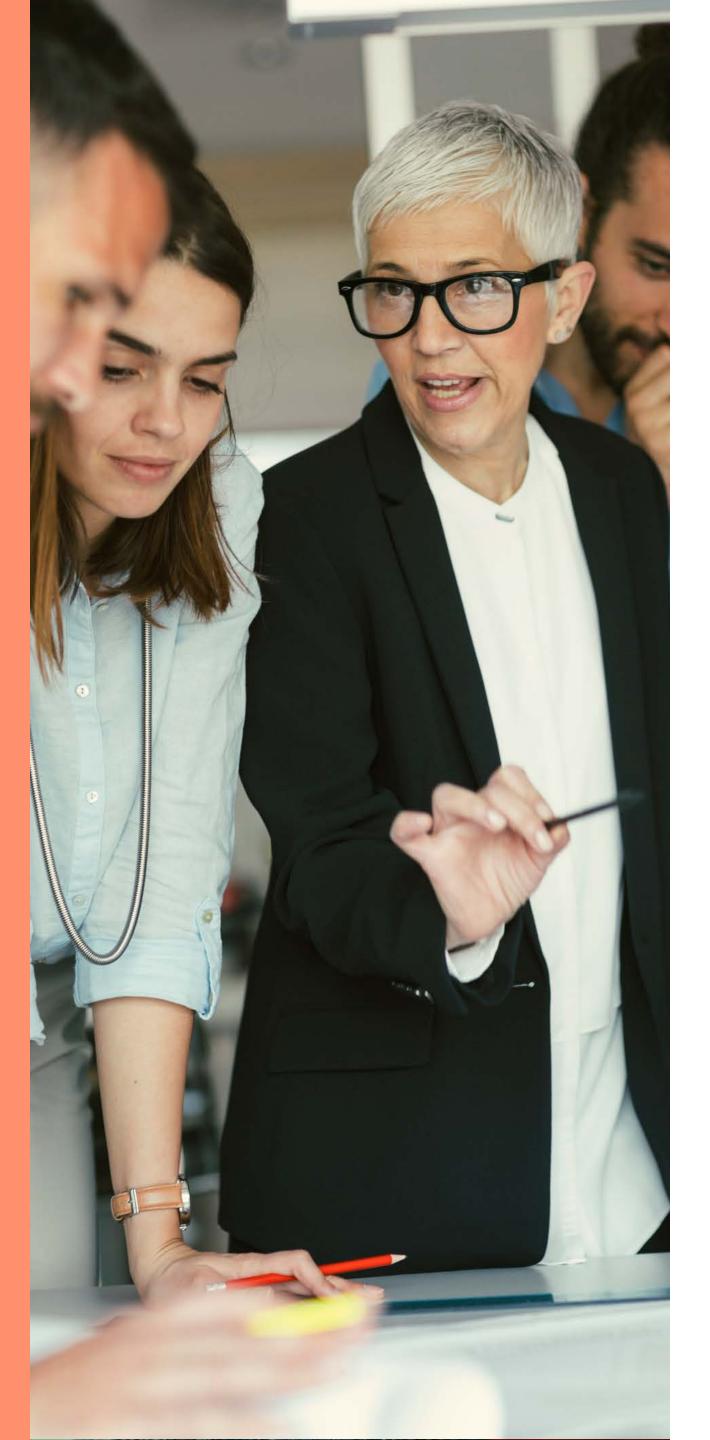
Assign business leaders to monitor metrics. Make sure leadership has the right data to identify early signs of success or failure, and refine best business practices.

Embed data in company wide communications. Accompany all communications with data to encourage leadership to participate in data-driven decision making across your company.

Connect with like-minded leaders to learn and help one another bring data to all types of decision making at the **Data Leadership Collaborative.**

Chapter 2
Enable real-time decision making with a unified source of truth.

Goal

You use business metrics to guide prioritization of data efforts. Your teams build data sources to address the most critical business questions.

What it looks like

Data owners and business owners form a cross-functional team to identify or create key data sources. Ensure that your data sources align to one or multiple parts of a business process. Use a data lake to centralize, secure, process, and organize large amounts of data so that teams across your entire company can access the unified data they need from a single location.

Next, identify critical decision points. Use your data sources to inform these points, explore and model potential outcomes, and measure the impact.

Making it happen.

Build

Generate insights on crucial business processes. Aggregate data from business processes most impacted by key performance metrics.

Unify your leadership team with data. Structure a workflow where each data owner, business stakeholder, and process expert all have a single view of the data and are assigned to oversee a different, crucial business process.

Audit your data use. Work with leadership teams to identify relevance of existing data sources, and resolve gaps in knowledge to create a complete and unified view of the data.

Run

Build data sources to support key decision points. Support key decision points with data analytics and unified data.

Run experiments with unified data. Achieve incremental improvements by adjusting different factors in multiple experimental trials.

Identify new drivers of improved performance. Monitor changes and measure the impact on business success.

Expand

Track ROI following business improvements. Analyze business impact with key performance metrics.

Offer your teams a single view of the data. Support performance reviews with data visualization to ensure that your team members' accomplishments are acknowledged and rewarded.

Collect data from process changes. Document all stages of business transformation, and make data associated with process changes available to teams across your company to guide their decisions.

Learn how Salesforce can help you create a single source of truth.

Chapter 3

Build trust through effective governance.

Goal

Grant your teams access to data to help them take initiative and make decisions. Declutter your business' data by personalizing team members' access and ensuring they find the relevant data they need.

What it looks like

Implement role-based licensing with governance built-in, so you can deploy data broadly across your organization while ensuring each user has the capabilities they need to make decisions based on data. Define who gets access to produced content for consumption and who gets access to processed data for analysis. For some team members it may be helpful to grant them access to download data sources locally and modify produced content.

Once access is defined, deploy automations to update access quickly when changes are made to workflows or personnel.

Making it happen.

Build

Establish clear roles and responsibilities around governance decisions. Identify stakeholders across the business to manage accessibility to facilitate cross-functional collaboration.

Establish strong exterior security around where your data is stored. Deploy automation to ensure that the right team members are granted access.

Align data access with project workflows to increase organizational agility and ensure team members can take initiative with relevant data sources.

Run

Set guidelines for how dashboards move into production. Make sure new data sources are in line with leadership-defined strategies.

Define how your business certifies data sources. Document and share your guidelines to help you and other administrators or project leaders to be consistent with your certification choices.

Manage tokens, passwords, and keys. Set one password for each data source.
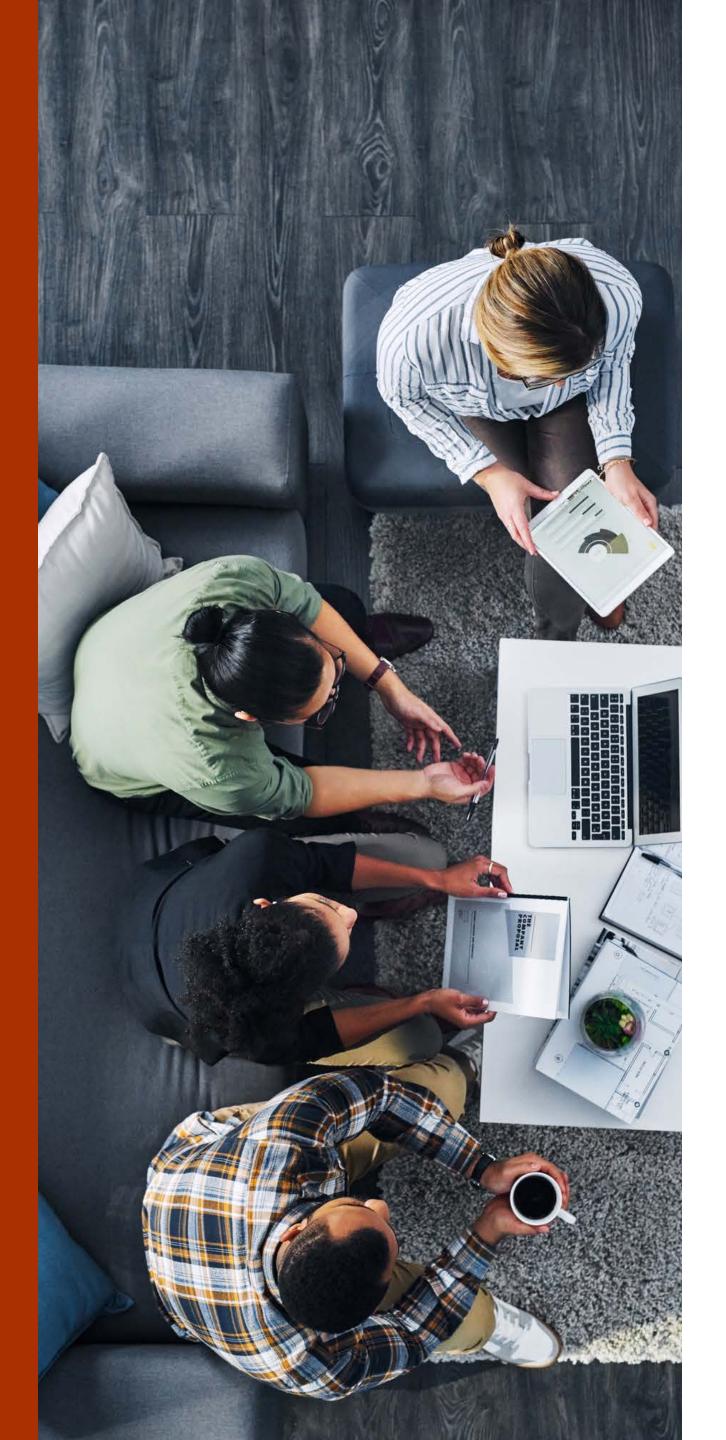
Expand

Establish SLAs around quality, refresh, and uptime. For instance, a pipeline to a sales dashboard might be updated hourly but at the end of the quarter it may be updated by the minute. As the business grows, SLAs become crucial to manage data pipelines.

Provide a catalog to define dimensions and provide context for your team members so you can feel confident your business is always using the right data.

Employ row level security. Streamline workflows and improve security by making sure that team members only see the data sources that are relevant to their roles.

Chapter 4

Empower leaders to make faster data-driven decisions.

Goal

Create immediate value and engagement by sharing key data insights through dashboards and data visualizations.

What it looks like

Create use cases in the form of visualizations, reports, dashboards, and/or workbooks that are useful, engaging, and offer insights to help solve immediate business needs. Use generative AI to share these data assets across your business so team leaders can receive text notifications with the exact data asset they need at crucial decision points–sometimes before they even know they need it.

Teams across the organization can then evolve these assets to suit their own needs and identify new areas that could benefit from additional data assets. As these assets evolve, ensure that teams refer back to the definitions outlined in leadership metrics, so everyone is speaking the same language. Share victories and patterns of success to help create a virtuous cycle that expands and deepens engagement across the organization.

12

Making it happen.

Build

Identify subject matter experts in each department that can provide quick feedback and ensure that data and analytics teams have the business context they need to develop data assets.

Identify use cases where teams could benefit from access to key data sources and engage the tiger team to address specific needs.

Outline requirements for data assets to determine if you need supplemental data to make them relevant to other audiences. Ensure customized metrics and dimensions can be mapped back to a standardized definition.

Run

Create purpose-built data assets like interactive visualizations, addressing key business processes and decision points. Tailoring assets to specific audiences. Increase approachability by turning analytics experiences into conversational interfaces that feel more like Q&As rather than traditional data reports.

Bring data assets into important meetings with stakeholders, executives, and board members to encourage data-based approaches to prevailing views and to showcase executive sponsorship.

Launch programmatic efforts and assign champions to offer support and coaching through formal meetings or informal communications like chat groups or company portals.

Expand

Incorporate data assets into employees' existing workflows by using APIs to set up embedded analytics in any workflow application.

Search for and incorporate new data into data sources and dashboards that support predictive and prescriptive analytics for more advanced use cases.

Support development of data knowledge by adding definitions, explanations, notes, and metadata to data assets, gathering feedback from users along the way.

Chapter 5
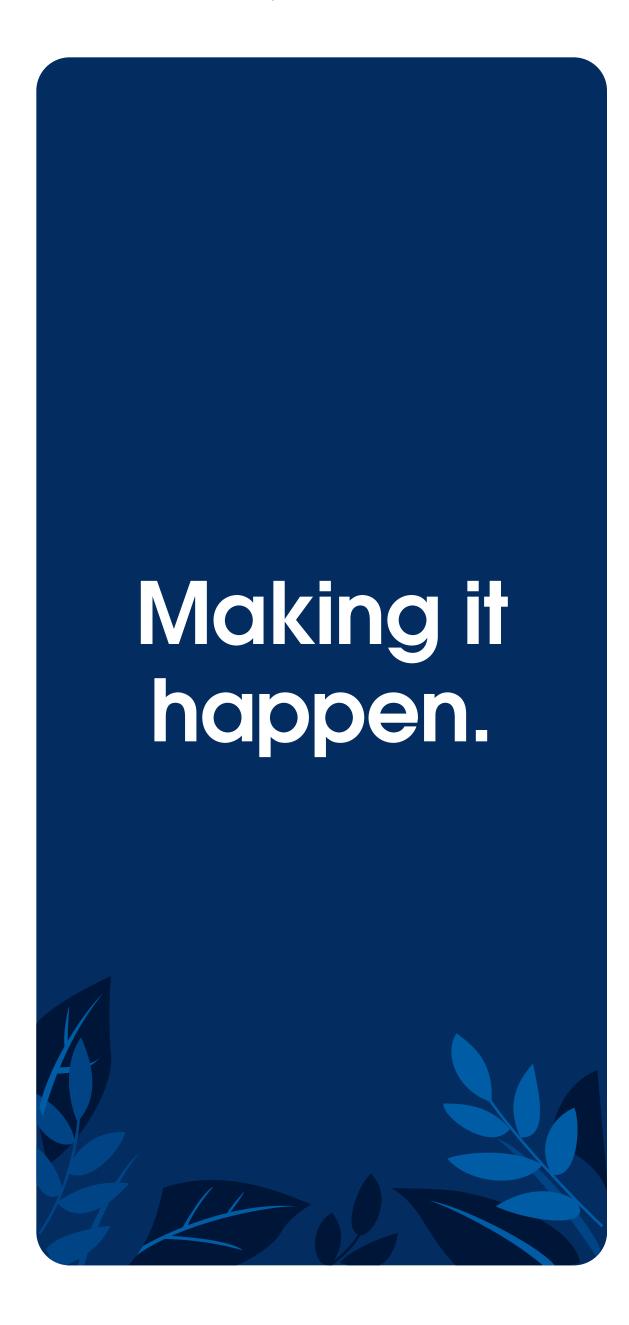# Provide data for every team member in the flow of work.

Goal

Empower people at every level to have the confidence to follow the data discovery cycle with minimal guidance. Create immediate value and engagement by sharing key data insights right in the flow of work.

What it looks like

Once people are confident with data, they will want to ask richer questions and create new data assets for themselves. This means data must be well-described, well-governed, and accessible. It also requires widespread data literacy–the ability to explore, understand, and communicate with data. At this stage, organizations benefit from data literacy training programs to teach fundamental data skills. Fostering community programs gives people a dedicated space to ask questions, share best practices, and encourage engagement. As engagement grows, formalize efforts with dedicated owners, leaders, and processes.

Making it happen.

Build

Prioritize collaboration in department-level goals and initiatives, empowering individuals at every level of the organization to own decisions in their purview and take action based on data.

Expand data exploration by using API technology to embed data assets into workflow applications, creating a seamless analytics experience. Enable ad-hoc analysis through access to natural language platforms powered by generative AI and visual analytics tools.

Start innovation and problem-solving initiatives like data competitions to propose new hypotheses that challenge established notions about how the business works.

Sharpen your data skills on Trailhead.

Run

Focus on enabling rather than creating content by expanding training initiatives. Open opportunities for all skill levels to build confidence and data literacy. Provide relevant examples so people can get up to speed quickly.

Institute community-building programs like lunch-and-learns, user groups, or competitions that set the stage for larger programs. People can ask questions, get help, and increase their data skills.

Invest in robust data lineage, the key to sharing data and building trust–make sure it's easy for your team to track how each data asset originated and how it has changed over time. Use your BI platform to identify and address data quality issues in sources with the highest usage.

Expand

Formulate a method and a repository to capture learnings, such as an internal portal or Wiki, and allocate employee time to this function.

Document leading practices for data discovery to capture successful methods and to provide inspiration to others. Actively maintain these practices and refine as your data culture develops.

Publicly identify and celebrate data champions and reward them through promotion cycles, career growth, and leadership opportunities. As data culture develops, consider formal data leadership roles.

Future proof your company with AI.

The widespread adoption of AI is increasing the gap between the leaders and the laggards: those who are actively embedding data and analytics into the fabric of their company culture and those who are hesitant to invest in the programs and the technology that help them get there. Data-leading organizations pivot when necessary, innovate constantly, and refine consistently, giving them a distinct advantage in times of change.

Creating a data culture isn't a matter of flipping on a light switch. Now is the time to make incremental changes, starting with your workforce. Build out focus areas that lay the foundation for individuals and teams to expand their use of data. Taking these steps will help you move in the right direction, future-proofing your data culture for whatever lies ahead.

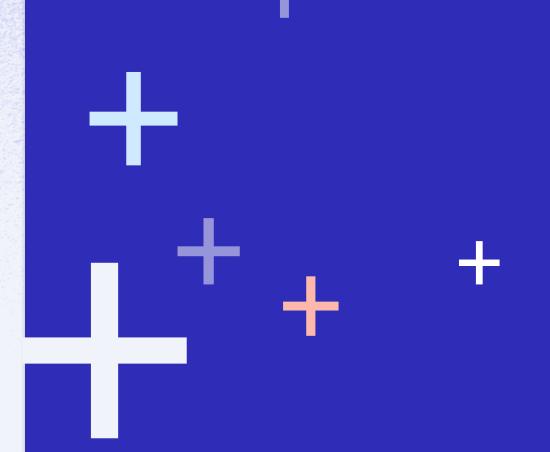# Connect Tableau with Customer 360 and grow customer relationships.

Tableau offers visual analytics with powerful AI, data management, and collaboration. From individuals to organizations of all sizes, customers around the world love using Tableau's advanced analytics to fuel impactful, data-driven decisions. Tableau also integrates with Salesforce Customer 360–a customer relationship management (CRM) platform that connects the business with a shared view of customer data–giving every department access to the most powerful, comprehensive, and intuitive analytics features embedded directly into workflows. By bringing your customer data to the center of your work, you can grow your relationships with your customers and employees.

Learn more about the **Tableau products.**

+ableau®
from Salesforce