![The Information Lab — TABLEAU EMEA PARTNER OF THE YEAR 2013]

De Montfort University sees "Exceptional results in reporting and engagement" with Tableau

De Montfort University is renowned for its creativity and innovation, and attracts students and staff of the highest calibre. Every department and faculty member plays their role in maintaining the university's high standards and the Strategic Planning Service are no different. Responsible for supporting decision making across the university, it needed to improve its reporting function. Having identified the problem the team needed to replace their existing reporting tool with a new visualisation solution. Since adopting Tableau they have seen big improvements in:

- Staff engagement
- Accessibility of data
- User adoption
- Availability of data

"With the effort Tableau saves us, we can spend much more time engaging with staff."

David Bryan, Head of Academic Planning
The Strategic Planning Service
De Montfort University
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DE MONTFORT UNIVERSITY LEICESTER

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395 users across campus.

3 new users added every week.

220 users working with Tableau every month.

A university with international appeal

Home to over 27,000 students and located in the city of Leicester, De Montfort University is a leading light in its field. Formed in 1870 and originally called the Leicester School of Art, the university has quickly gone from offering voluntary education to being accredited with 'world leading' and 'internationally excellent' status for its research efforts.

Proud of its reputation for 'quality and distinctiveness', De Montfort University is a truly international place of study, with 127 different nationalities enrolled on its 170 undergraduate and postgraduate courses.

With a vision to 'be a recognised leader in creative education and research' the university encourages pioneering thinking by both staff and students alike.

Identifying the problem

The Strategic Planning Service - responsible for turning business data into strategic information - is a key contributor to ensuring the university's vision is adhered to. Its focus is on delivering reports that will help with decision making.

"We have a clear remit to provide information in the best way to the different faculties and business partners that we work with" explains David Bryan, Head of Academic Planning at the university.

"The information we collate needs to be two things; data rich and easy to understand", explains David. "It should clearly answer the question - what does this tell us?".

The department analyse student data in a number of ways, using a variety of tools, putting together reports that would help their colleagues with marketing campaigns and admission statistics. However, it has become apparent this year that there was a clear need to start
communicating data in a more sophisticated way.

David explains "Presenting data meaningfully was difficult to achieve as the solutions we had in place were very technical. People found them difficult to use".

This situation also created additional problems for David and the planning team, "Because the tools were so complex to master, updating reports took considerable time and effort. Their lack of flexibility meant users often couldn't generate the answers stakeholders were looking for."

A mixed economy

As a result of the problems with existing tools, other departments begin to look elsewhere for solutions, as they felt the Planning team couldn't deliver.

"Other teams were doing their own thing. It was often easier for them to produce ad-hoc data solutions of their own, than rely on our central reporting function. In turn our own staff started to become disengaged" explains David.

With departments and colleagues using different tools, collaboration was becoming impossible.

"In meetings teams would bring along their own data and it would be different to everyone else" recalls David. "Instead of data that could be quickly assessed and understood, everyone would have slightly differing views".

As a result time was being wasted, meetings weren't productive, and reporting output was poor. David knew action needed to be taken. "Our staff weren't happy, and consumers of our reports where becoming more and more disengaged. A review was required".

Finding the right solution

The department needed a solution. Their current tool was stifling productivity and preventing progress. To improve engagement with colleagues and other teams they needed to make some changes. David was heavily involved:

"There was already a project in place to look at business intelligence tools for the next five years. The project quickly highlighted the need for immediate action. It was clear we needed to get moving sooner rather than later, so we decided to trial a number of visualisation solutions".

Extensive research was conducted and a number of bespoke solutions were assessed. These included Qlikview, Tableau and Birst. "We wanted to be thorough with our research and choose a tool that was right for us". Over the coming months David and the planning team tried out five different visualisation tools with various members of the department.

David recalls his first experience with Tableau, "As soon as I used it I knew it would

immediately add value to what we did, but I also knew this was a tool everyone could easily use. This was key to our decision."

The department trialled Tableau over an initial two week period. A number of dashboards were built for the team, to see what Tableau could offer. These used real data and where based on real reports - KPIs and university league tables. The trial was a huge success and the feedback from within the team was conclusive "in terms of our requirements it did everything we wanted" said David.

The initial trial hadn't gone unnoticed with other departments. HR and Finance showed an interest in Tableau. David explains "we had to ask for an extension for the trial, such was demand". Tableau agreed and more people got involved.

An easy decision to make

Due to the success of the trial, the Strategic Planning Service selected Tableau as their tool of choice and began using it in earnest. The interest from other departments meant authorisation was granted by the university to buy forty server licenses and 10 desktop licenses.

Interest was across the board, Faculty Managers, HR and Finance data analysts, Deans and core executive stakeholders all became involved in the trial process.

David believes a big factor in why Tableau has been so successful is down to its ease of us "our previous tool was very technical, which put new users off". Tableau eradicated this problem.

"Staff - of all levels and abilities - are using Tableau as it's extremely intuitive. We are able to develop polished, good looking solutions in a short amount of time and not have to worry about end user training".

With a wide variety of staff now using Tableau for report creation, viewing data and sharing with their colleagues, it wasn't long before the wider university community showed an interest.

Within three months, such was demand, a decision needed to be made. David explains "the widespread uptake across the university meant every business area was now wanting to use Tableau to produce reports".

The uptake of Tableau was such that it was decided an institutional licence was the only way to go. De Montfort University subsequently bought an institutional licence, so that Tableau could be made available to all of its staff.

Having been involved right from the beginning, David knew the power of Tableau. He didn't however anticipate the sheer uptake from other members of the university staff:

"When we started this process I couldn't have imagined that we'd be in the position we are today", David continues, "to have an institutional license so quickly is fantastic. What is even more rewarding is seeing the output and enthusiasm

from users across the university. It is clear Tableau has been an unmitigated success at De Montfort."

A raft of benefits to the whole University

Tableau has not only benefited the Strategic Planning Service, but has realised a number of benefits to many other teams at the university. The Academic Quality Department have used Tableau to deliver information to colleagues, while HR are using Tableau to provide data for specific projects like Athena Swan - which recognises commitment to advancing women's careers in science, technology, engineering and maths.

A number of benefits have stood out in particular:

- **Engagement levels have increased.** Previously data was difficult to create due to the technical nature of the old tools. This was impacting work flow and productivity.

  Tableau has appealed to staff members who ordinarily had no interest in data. David explains "from a user perspective, the reports are so responsive and visually engaging, staff seeing it are eager to use Tableau and explore what it can do for them".

- **Data mining has never been so easy.** Previously people spent more time deciphering the data in reports than focusing on the story they were trying to tell.

  With Tableau, the Strategic Planning Service are now producing information that has an impact. Results are displayed visually, so information can be

clearly understood. The story jumps out.

David explains "the way we now look at reports has changed, figures on a spreadsheet can be one dimensional. Tableau's output adds real value."

- **Tableau's ease of use has seen user adoption increase weekly.**
  Stakeholders can often be hesitant when a new solution - particularly IT related - is introduced. Time and resources can be spent delivering training and engagement methods with little or no interest.

  The successful uptake of Tableau at De Montfort University has largely been put down to how intuitive the software is. "Ease of use means that staff traditionally not able to produce reports are completely involved" says David.

  Tableau has provided flexibility for its users and encouraged use, benefiting all at the university "more time can now be spent on engagement with our colleagues rather than preparing the data itself".

Future scope

With an institutional licence and a growing user base, David believes the potential for further Tableau use is huge. "By no means have we utilised all possibilities that Tableau offers, there's so much more to learn".

"A university wide study is in place to question staff of all levels on the data they want to see produced in the future. These are exciting times for Tableau at De Montfort"