

The Data Culture Playbook

How to accelerate the value of analytics and AI



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Introduction

This playbook is for business, data, and IT leaders who want to understand the value of data culture and the steps to build one.

What exactly do we mean when we say, “data culture”?

A data culture is the collective behaviors and beliefs of people who value, practice, and encourage use of data and AI to propel organizational transformation. It equips everyone in an organization with intuitive, productive insights for tackling complex business challenges.

AI imperative and the role of data

The age-old problem of bad data in resulting in bad data out holds even more true when you add AI to the mix. Besides potentially producing inaccurate answers, concerns exist around AI perpetuating bias and data being misused or compromised, which makes the need for trusted data and technology at an all-time high.

To address these rising concerns related to the proliferation of and greater access to AI tools, you must start by creating a strong foundation of data trust and transparency within your business. It’s all connected—and you need this foundation to realize the value of your analytics and AI tools. But what does it look like?

This foundation looks like an environment where people trust the data, have secure access to actionable insights, and use these insights to be more productive and effective in their work. This is where having a strong data culture comes in.

86% of technical decision makers agree that AI’s outputs are only as good as its data inputs.¹

Solution

Data Culture

Creating a data culture helps you accelerate the value of analytics and AI. It transforms the quality and speed of decision making across an organization and forms a foundation of data trust and transparency.

Building a data culture requires time, investment, and an organization-wide commitment, but a robust data culture is critical to making your data and people be AI ready. This playbook will guide you through the key steps to achieve—and maintain—a data culture for your organization’s long-term success.

Benefits of a strong data culture¹

- 1 Greater productivity
- 2 Innovation
- 3 Better customer service
- 4 Confident decision making
- 5 Cost savings



We’ll discuss how to build a robust data strategy in Chapter 1, how to invest in continuous learning to help your people confidently use data and AI in Chapter 2, and how to advance your journey through data maturity in Chapter 3.

¹[State of Data Analytics Report](#)

²[McKinsey, 5 Facts: How Customer Analytics Boosts Corporate Performance](#)

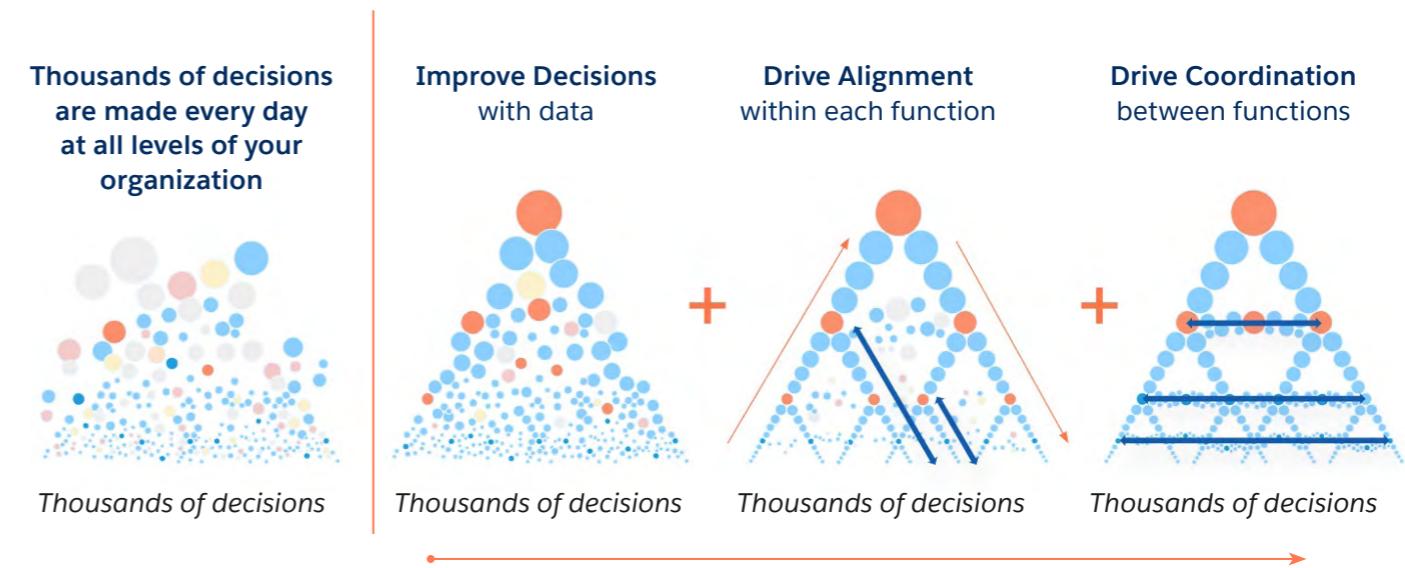
³[Salesforce “State of Data and Analytics,” 2023](#)

Value of a strong data culture

Establishing a strong data culture reaps rewards across your organization—from rapid innovation, personalized customer experiences, and improved decision making to reduced costs, higher employee retention, and increased revenue. And while the journey to build a data culture can seem daunting, with the right strategy, you can plan for data and AI success.

This playbook lays out simple, yet effective steps for establishing a data culture. It's designed to help business and IT leaders understand how your people can use data-driven insights to improve decision making and ultimately realize value from a strong data culture in your organization.

Data culture improves efficiency, trust, results



Each chapter focuses on a specific element, from building your data and AI strategy and empowering your organization through continuous learning to advancing your data maturity. Keep in mind that building your data culture isn't linear—it's a living organism that continuously evolves. These steps can be executed and repeated, both as your data culture comes to life and even after it is thriving.

Within each chapter, you'll find a case study for inspiration and a checklist to help you achieve the goal.

Are you ready to create a resilient foundation for AI and invest in the future by building a data culture? Let's get started.

Chapter 1:

Build your data and AI strategy



Know that your strategy starts with people

Data is the backbone of every AI strategy—and making high-quality, trusted data accessible to more people is key to unlocking the full potential of AI. And a strong data culture can help you do this by equipping more people with the right technology, processes, and insights to help your entire organization achieve data-driven success.

78%
of analytics and IT leaders say their organizations struggle to drive business priorities with data.³

85%
agree or strongly agree that advances in AI make data management a high priority strategy.³

³[Salesforce “State of Data and Analytics,” 2023](#)

Low customer engagement and data trust

Customers are increasingly making AI part of their everyday lives yet they're approaching the technology with mixed emotions.

74% of the general population is concerned about the unethical use of AI and 63% is concerned about its biases.⁴

Common obstacles to AI trust

- 1** **Problem:** Disconnected analytics ecosystem
Cause: Siloed data and poor integration with workflows
- 2** **Problem:** Low trust in data and AI quality
Cause: No single source of data truth
- 3** **Problem:** Unclear data ownership and accountability
Cause: Undefined data governance responsibilities
- 4** **Problem:** Buried insights
Cause: Low data discoverability and role-based access
- 5** **Problem:** Need for data and AI skills
Cause: Lack of data fluency and adoption

Solution

Data strategy

To bridge the AI trust gap and increase the broad use of data across your organization, you need to have a data strategy. Building a data strategy will equip you to increase your operational efficiency and revenue streams.

The secret to unleashing actionable insights is marrying trusted analytics with the power of AI. With the power of AI, the secret to unleashing actionable insights consumption at scale by bringing trusted generative AI to the entire platform. By combining analytics and AI with people equipped with data skills, you can maximize your technology investments and uncover opportunities that drive business strategy and strengthen customer trust.

Top 5 AI benefits for analytics and IT leaders

1. Faster business decision-making
2. Operational efficiencies
3. Free up time for valuable work
4. Automated workflows
5. Improved customer satisfaction

How to create a robust data + AI strategy

An effective change management plan details how you will engage people across your organization to promote ongoing awareness, education, and a strong data culture. Start by identifying members of a cross-functional team to form your steering community or center of excellence (CoE). Your team will:

- Determine business goals or benchmarks where data and AI can help increase productivity, improve customer understanding, reduce manual efforts, or drive targeted business outcomes.
- List use cases and select quick wins.
- Set and align business goals and performance measures (OKRs).

After you've established this framework, you can create a change management plan that articulates the behaviors and beliefs you want to instill in people throughout the organization. First, determine that your stakeholders are engaged and know what to do. Then, address specific steps you will take to:

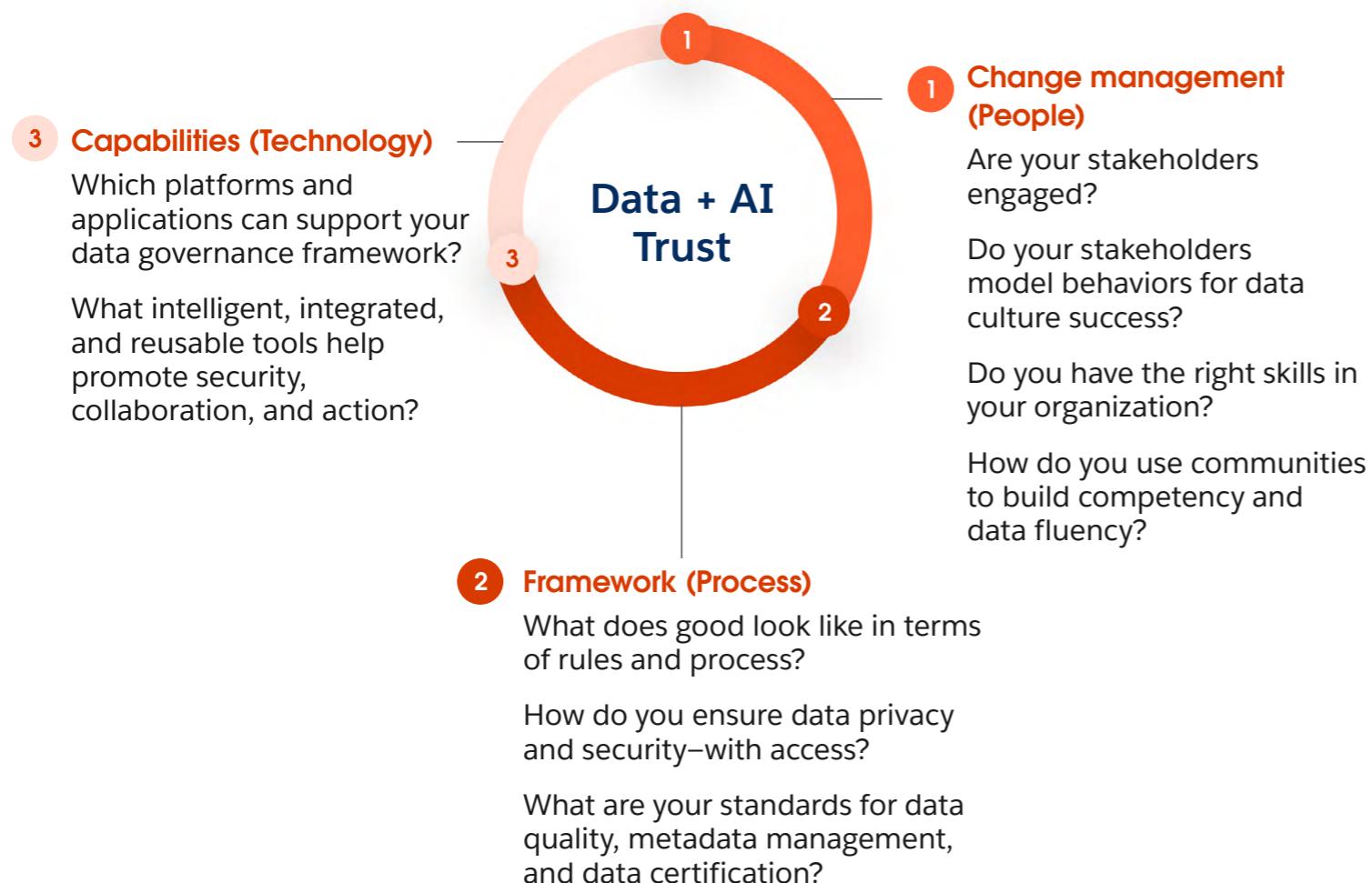
- Train your community to build data and AI competency
- Establish a data governance council
- Create realistic data maturity model targets
- Learn and improve through a continual feedback loop



The changes that are happening with AI are too big to only funnel through the data team, and are too profound to wait for other data infrastructure projects to be ready before you start more widespread implementation. The business units are going to move. It's better to be part of the change than to try to be a silo outside of it and lose your relevance to the business."

SOLOMON KAHN
FOUNDER & CEO, DELIVERY LAYER AND
DLC ADVISORY BOARD MEMBER

Core components of data governance with AI capabilities



Case Study

JP Morgan Chase

Learn how JP Morgan Chase, a global financial services company, fosters a data culture among its employees to innovate faster, improves the customer experience, and makes insight-driven decisions across the business in a highly regulated space.

Steps you can take

- 1 Create an internal data leadership community and join the Data Leadership Collaborative.
- 2 Prioritize data in decision making and business processes.
- 3 Identify, understand, and set a plan to solve root causes for data issues.
- 4 Solidify core components of data governance: framework, change management, and tools.
- 5 Practice data-driven behaviors: Align your data, analytics, and AI to business outcomes.

JPMORGAN
CHASE & CO.

Chapter 2:

Empower teams to deliver on data's value



Close the skills gaps and provide trusted tools

To get the most out of your data, you need more than technology alone. Promoting data fluency at every level empowers people to use trusted data and AI tools effectively so they can apply actionable insights and improve their decision making.

#1
challenge for organizations, according to IT leaders, is the lack of AI talent and skills.⁵

24%
of today's leading employers have included this critical skill-building into their corporate strategy.⁶

⁵Salesforce, The AI-IT Disconnect, 2024

⁶BCG, 2023

Challenge of the data skills gap

Does your entire workforce have the skills, tools, and curiosity to deliver on data's value? Most likely not. Start by assessing skills and gaps in your people's knowledge that can impact their ability to make insight-driven decisions. Leadership agreement is critical in assessing current skills and identifying workforce needs to identify what is critical to using data effectively.

Audit and assess your workforce and organizational needs for data analytics and AI skills by aligning use cases to employee competency. For example, what data and AI skills do you expect a product manager to have versus a financial analyst? You may want to create a matrix that shows your current and future (ideal state) workforce skills based on data culture behaviors that drive data maturity (described in Chapter 3).

Innovative solutions can also help you address the data skills gap more quickly and across all of your teams. You can use AI in Tableau solutions like Tableau Pulse to democratize data analysis and simplify insights consumption at scale. It accelerates time to value and reduces repetitive tasks for the data analyst with smart suggestions and in-product guidance. Knowing our AI is built on the Einstein Trust Layer, your organization is enabled with trusted, ethical, and open AI-powered experiences without compromising data security and privacy—which is critical as you grow access to analytics and AI, and nurture data skills.

Solution

Continuous Learning

Change management is a key component that can promote your people's skills and capabilities. After all, investing in data and AI tools will not ensure your people have the skills to use them. That's where training and development play an important role. Continuous learning through training, education, and data community involvement ensures your workforce has the skills needed to use your tools. And it is an ongoing investment that should be fully aligned with your corporate strategy.

Consider this a two-step process. First, you need to uplevel your current workforce in terms of its data fluency and AI proficiency. And second, you want to recruit and hire talent that aligns with your data and AI strategy.

60%

of people leaders say the rise of AI and automation will make data security skills more important.⁷

Invest in technology and access to data

Maximizing analytics investments and capitalizing on the transformative potential of data means that everyone who encounters data—regardless of their skill level—can find insights and take action. Rather than rely on instincts or feelings, your people actively seek to use data in their decision making. Promote user education, measure adoption and engagement, and increase analytics use within your organizations to support insight-driven decisions.

AI capabilities empower your people by adding automated, plain-spoken explanations to your dashboards in seconds, helping you to discover the “why” behind insights with dynamic visualizations that allow deeper exploration, and bringing trust and transparent predictions and recommendations to everyone.

In addition, AI in Tableau brings trusted generative AI to your workforce. Tableau strips sensitive data processed by LLMs with data-masking tools, and Salesforce never stores proprietary data outside of its platform nor uses it to train LLMs. Not only are responses scanned for toxicity and bias and audited for compliance, but all prompts and generated responses are forgotten as soon as an external model processes a prompt. As you consider your needs, a helpful goal is to ensure the entire generative AI process is safe, secure, and trustworthy.

Case Study

Staysure

Find out how Staysure uses Tableau Cloud to break down fragmented data silos, eliminate bottlenecks, and encourage data exploration and analytics fluency.

 Staysure™

Steps you can take

- 1 Audit and assess your workforce and organizational needs for data and AI skills.
- 2 Set an actionable talent management plan for recruitment, retention, and upskilling.
- 3 Invest in delivering the right tools and access to data to your people.
- 4 Build a community of practice that helps people interact with and learn about data and AI from others.

Chapter 3:

Advance your journey to data maturity



Create processes that support your data maturity

Your business is on the path to data maturity. Data maturity requires you to identify best practices that will ensure you're ready to take advantage of AI.

Respondents who say they have high data maturity are **2X more likely to have the high-quality data needed to use AI effectively.⁴**

According to [Forbes](#), data maturity is a measure of an organization's ability to use data, along with how well the organization leverages those capabilities. When an organization is data mature, it means that it can deploy its data resources to achieve a range of goals. In many cases, this not only means making data-driven decisions, but also making data resources more accessible throughout the organization.

The point of data maturity and the preparedness recalls the analogy of moving up and to the right on the maturity curve, driving the ability to take greater advantage and prepare for AI.

Tableau customers see 25% faster creation of custom generative and predictive models.⁸

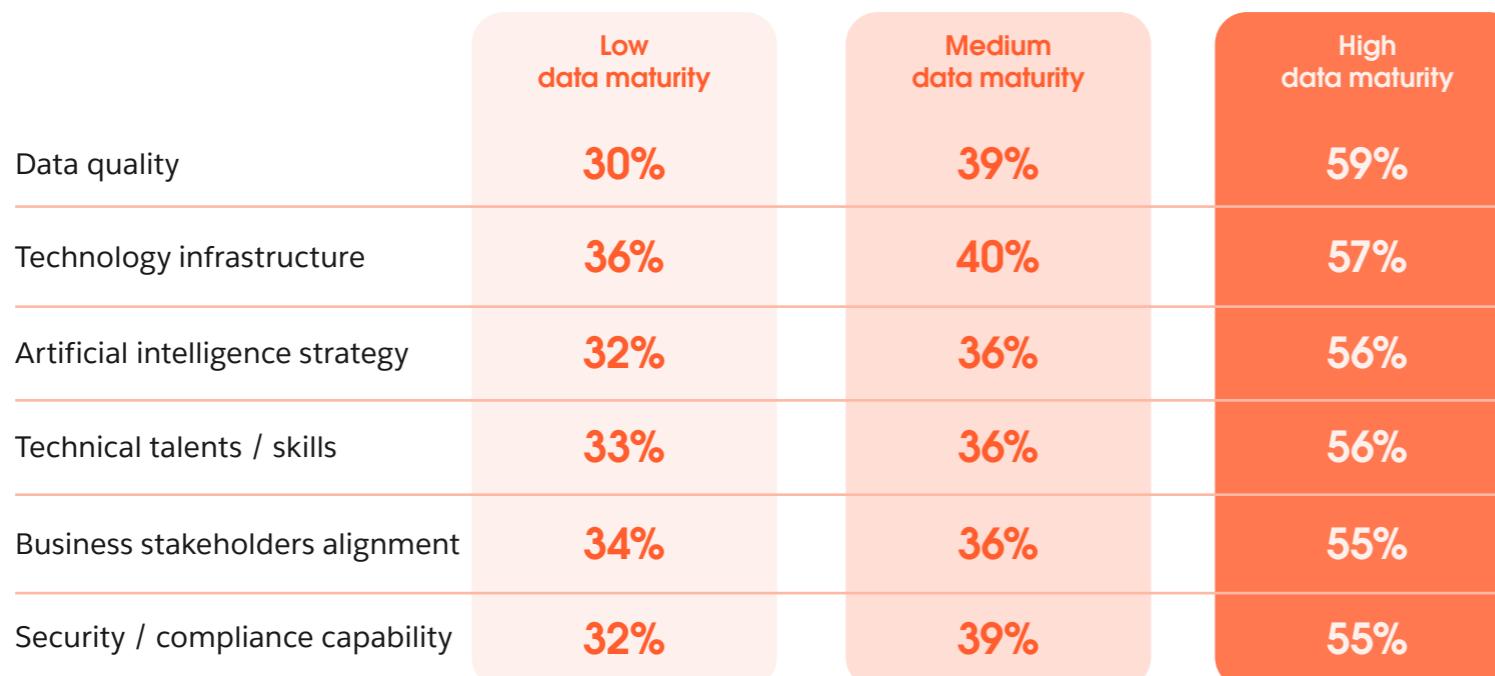
["Salesforce "State of Data and Analytics," 2023](#)

["Source: 2024 Salesforce Success Metrics Global Highlights. Data is aggregated from 2,165 customers across 10 countries."](#)

Data maturity definition and model (stages)

Your ability to take advantage of AI depends on your organization's behaviors and data capabilities. The greater your capabilities, the higher your data maturity. Clearly this isn't a process you can complete overnight. It's not a matter of "one and done." However, the more your people, processes, and technology are aligned, the further you will progress through these stages of data maturity—ultimately enabling your people to confidently make the right data-driven decisions for your business.

Data capabilities needed to take advantage of AI



Solution

Data maturity best practices

To progress on your data maturity roadmap, consider implementing these best practices:

1 Model and measure success.

Define what data maturity looks like and means to your organization. Benchmark competency levels and capabilities across people, process, and technology. Measure your ROI using the following key performance indicators: business performance, analytics productivity, organizational alignment, community satisfaction and adoption.

2 Ensure your data sources align to one or multiple parts of your business process.

Build curated, analytics-ready data sources to address critical decision points. Use a data lake to centralize, secure, process, and organize large amounts of data so that people across your company can access the unified data they need from a single location.

3 Promote a culture of data-driven decision making.

Use data discovery coupled with AI-infused analytics to improve productivity. Get commitment of executive stakeholders to behavior change and budget allocation for change management. Automate analysis and increase data collaboration.

Build data maturity roadmap

Elements of a successful data maturity roadmap include considerations around your analytics strategy, governance approach, having an agile or flexible deployment, and communicating the value of and facilitating a community that supports analytics.

Streamline processes:

Discuss integration of AI to automate and enhance data processes

Steps and best practices to build trust

Offer insights into simplifying data collection, storage, and analysis processes

Define use cases, start trials, get quick wins

Cultural shift:

Build or support a community that inspires and celebrates data-driven wins.

Tips for fostering behaviors that promote data-driven decision making and its value

Communicate across teams - build community and embrace Tableau Community



JOHN LEWIS
& PARTNERS

Case Study

John Lewis Partnership

Watch this video to see how John Lewis Partnerships uses data and AI to transform customer experiences and improve profitability.

Steps you can take

- 1 Model and measure success. Define what data maturity looks like and what it means to your organization.
- 2 Ensure that data sources align to one or multiple parts of your workflow.
- 3 Promote a culture of widespread data discovery coupled with AI-infused analytics to improve productivity.

Conclusion

Tableau provides the trusted data, analytics, AI, and visualization tools you need to create a data culture in your organization. Your data journey begins on our platform, where we provide a single source of truth across your organization. Then, AI in Tableau leverages your data, reveals trends and patterns, and uncovers actionable insights to drive accurate and rapid decision making—without impacting your existing technology investments.

To start building your data culture, review the steps outlined in this playbook.

Tableau is here to help accelerate your data culture journey with AI-powered insights. For example, you can get from data preparation to visualization faster using a trusted advisor right in your workflow. And you can gain meaningful insights from your data to guide and improve your decision making. Finally, you can leverage the productivity gains of AI without compromising on data security and privacy.

Our analytics capabilities support trusted AI to democratize your data analysis and insight consumption, helping everyone in your organization—from business users to data professionals—harness the full power of data and make informed, data-driven decisions.

Next steps



Analytics 1:1 connect & demo

Deep dive into our products to learn how we help data people deliver results for less.

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About Tableau from Salesforce

Tableau is the world's leading AI-powered analytics platform. Intuitive data experiences, backed by generative and predictive AI capabilities, elevate insights where you work most. Offering a suite of analytics and business intelligence tools, Tableau turns trusted data into actionable insights so you can make better decisions every time. Tableau offers the most choice and flexibility for your architecture as your technology and AI strategy evolve. With security, data governance, and compliance in mind, your organization can maintain agility as new demands on data arise.

Tableau is committed to supporting the unique needs of organizations around the world with the largest partner and success ecosystem, including the passionate Tableau Community that can teach, support, challenge, and celebrate you at every stage of your AI journey. The future is limitless when you start with data and move forward with Tableau. For more information, visit www.tableau.com