

Integrating Tableau with Salesforce for Deeper Insights into Sales Performance

The client is a global card services company with operations across the globe. They were looking to enhance their sales performance by combining the power of Salesforce with the rich data visualization abilities of Tableau.

BUSINESS GOALS

- Integrate live Tableau dashboards and data visualization directly into Salesforce Canvas
- Deliver a seamless user experience and increase productivity

CHALLENGES

The business team was using a native Tableau application to slice and dice their sales performance metrics. However, Tableau's data and visualizations did not integrate with Salesforce, which required users to log-in to both the Tableau and Salesforce applications in order to compare sales performance metrics with Salesforce data.

Switching back and forth to compare the two data sets was a difficult and cumbersome process, wasting time and limiting business users' ability to get a complete picture of sales performance.

SYNTEL SOLUTION

- Embedded Tableau dashboards into the Salesforce using the Force.com Canvas framework
- Used Tableau's custom-built Java Sparkler adapter to serve data from Tableau to a custom Canvas Visualforce page
- Used a connected app to enable Salesforce to communicate directly with Sparkler
- Multi-application login was enabled using OAuth to share user info like Exchange ID, Profile, email and phone number

BUSINESS BENEFITS

- Increased visibility into sales and product data
- Better business insights to guide decision making
- Improved business user productivity, due to simplified data presentation and streamlined login process

