interworks

**\*Plans are customized per client.**

**We would not necessarily suggest every single element included in this sample.\***

2018-19

# Enablement Plan

Presented to

**Clients with**

**50+ Desktop/Server/Alteryx Users**

## More Than Just Training

InterWorks seeks to empower your team with the tools and knowledge necessary to succeed in their analytics strategy. Based on our extensive experience, InterWorks will set a foundation of training and support an ongoing plan of excellence. We'll work together to ensure your organization will continue to drive better decisions and grow in the art of data storytelling. With certified trainers based in the US, APAC, and EMEA, we have the talent to support your enablement plan both virtually and in-person.

## Enablement Plan by User

For each role, we've outlined the possibilities – official classroom training and ongoing support to further your users' skills and connection to the larger analytics community.

By bundling courses and ongoing support you will be setting up your entire organization for success with predictable touch-points.

# InterWorks: The Way People Meet Data

## Who We Are

### People-Focused, Tech-Driven.

InterWorks is a people-focused tech consultancy, delivering premier service and expertise to clients around the globe. By putting people first and equipping them with the tools for success, we help them do more and strengthen their bond to the larger tech community.

## What We Do

### Expertise. Tools. Community.

As Tableau's first Gold Partner and a repeat Partner of the Year, InterWorks is the ultimate Tableau resource. Our development of Power Tools for Tableau, the "Tableau Your Data!" guidebook and a globally acclaimed blog are further proof of our mettle - but Tableau is just the beginning. With experience in data warehousing, engineering, dashboarding, automation and integration, our holistic understanding of data gives our clients an uncommon advantage.

# Data Curators

Building, preparing and maintaining data sources takes a lot of work. Many tools and a wide-variety of skillsets are involved. How can InterWorks help? We have developed courses to get your team on the path to becoming Alteryx Aces.

| COURSE | July | Aug | Sept | Oct | Nov | Dec | Jan | Feb | Mar | Apr | May | June |
|--------|------|-----|------|-----|-----|-----|-----|-----|-----|-----|-----|------|
| **Designer Core** | | | ● | | | | | | ● | | | |
| **Designer Advanced** | | | | | ● | | | | | | | ● |

- **Designer Core**
  - This course is designed to give you a solid foundation with the tool, so you can walk straight out of class and into your own workflows. We'll talk through the Designer interface, build vocabulary of terms needed to speak "Alteryx" and explore ways to enhance your learning through the built-in sample workflows. You'll spend time importing, connecting and shaping data so that it can be used in the most popular business intelligence reporting tools. This course also covers an introduction to both macros and analytic apps, enabling you to take your workflows beyond data merging and shaping and into building your own custom tools and distributing your workflows to others.
  - Course length:16 hrs
  - Delivery: In-person over 2 days or virtual classroom over 5 days (2.5hrs total per day)

- **Designer Advanced**
  - This course is all about the deeper dive, going beyond generic data shaping into data investigation, reporting and predictive analytics. You'll learn techniques for parsing data using existing tools as well as how to configure regular expression tools. This course devotes a whole section to spatial analysis tools, illustrating everything from defining trade areas to finding out if there's overlap. You'll also learn how to take latitude and longitude coordinates and build spatial objects. The Alteryx Designer Advanced course builds on the macro concepts from the Alteryx Designer Core course, expanding into iterative and batch macros. Analytic apps get more love here as well, moving into additional interface tools. We'll round out the course with a healthy discussion about the Alteryx Gallery and then share our work.
  - Course length:16 hrs
  - Delivery: In-person over 2 days or virtual classroom over 5 days (2.5hrs total per day)

# Administrators

Installing and maintaining Tableau Server combines the technical know-how your IT team has with the guidance of how to apply their skills to the Tableau environment. So how do you get each from novice to expert?

| COURSE | July | Aug | Sept | Oct | Nov | Dec | Jan | Feb | Mar | Apr | May | June |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Server for Admins** | | | ● | | | | | | ● | | | |
| **Server for Creators** | | | | ● | | | | ● | | | | |
| **QA Prep Bootcamp** | | | | | ● | | | | | | ● | |

- **Tableau Server for Administrators**
    - Learn what it takes to efficiently manage your Server environment including installation, content management, users, and permissions. Other key topics include schedules, tasks, and subscriptions, Command Line Utilities / API, and Install/Upgrade Procedure.
    - Course length:24 hrs
    - Delivery: In-person over 3 days or virtual classroom over 5 days (4.5hrs total per day, incl lab)

- **Server for Creators**
    - Remaining within the Server environment, Creators will go end to end in their data insight journey - connecting to trusted data sources, bringing in new data as required, creating and publishing content specific to their end users' needs.
    - Course length:8 hrs
    - Delivery: In-person or virtual classroom

- **Tableau Server Qualified Associates Prep Bootcamp**
    - We'll provide two "QA Bootcamp" sessions to make sure you're prepared to pass
    - Course length: 2 hrs
    - Delivery: In-person or virtual classroom

# The Creators

"Report creators/dashboard developers/visualization analysts," this group can go by many names but their roles all boil down to one common trait – they spend most of their time working in Tableau Desktop. Training this group of users can seem a bit daunting with many courses applicable to advancing their skillset. We'll help you break it down in to manageable bites.

| COURSE | July | Aug | Sept | Oct | Nov | Dec | Jan | Feb | Mar | Apr | May | June |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **VBP Analysts** | | | ● | | | | ● | | | | | |
| **DI: Fundamentals** | | | ● | | | | ● | | | | | |
| **DII: Intermediate** | | | | ● | | | | ● | | | | |
| **Server for Creators** | | | | ● | | | | ● | | | | |
| **QA Prep Bootcamp** | | | | | ● | | | | ● | | | |

- **Visual Best Practices for Analysts**
  - Aimed at anyone with an interest in telling vivid, impactful stories using data, this intensive seminar focuses on best practices for visual analytics to drive understanding through visualization.
  - Course length: 8 hrs
  - Delivery: In-person or virtual classroom

- **Tableau Desktop I: Fundamentals**
  - Build a solid foundation in Tableau. You'll learn how to navigate the product and examine core concepts and techniques.
  - Course length:16 hrs
  - Delivery: In-person over 2 days or virtual classroom over 5 days (2.5hrs per day)

- **Tableau Desktop II: Intermediate**
  - The course will bring your use of Tableau to the power user level. Complex calculations, sophisticated visualizations and dashboard navigation are just some of the highlights of the training content.
  - Course length:16 hrs
  - Delivery: In-person over 2 days or virtual classroom over 5 days (2.5hrs per day)

- **Tableau Server for Creators**
  - Remaining within the Server environment, Creators will go end to end in their data insight journey - connecting to trusted data sources, bringing in new data as required, creating and publishing content specific to their end users' needs.
  - Course length:8 hrs
  - Delivery: Virtual classroom

- **Tableau Desktop Qualified Associates Prep Bootcamp**
  - We'll provide two "QA Bootcamp" sessions to make sure you're prepared to pass in a 2-hour workshop (can be delivered virtually)

# The Explorers

The data explorers are the ones who are at the forefront of your self-service analytics movement. They need to understand the components of a visualization project from start to finish and want the tools to customize the final product to meet their specific requirements. Tableau Server will be the main reporting environment for these Explorers.

| COURSE | July | Aug | Sept | Oct | Nov | Dec | Jan | Feb | Mar | Apr | May | June |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Tableau for Directors | | ● | | ● | | ● | | ● | ● | ● | | ● |
| Server for Explorers | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● |

- **Tableau for Directors**
  - Explore the idea of visual analytics from a project perspective, diving into how you can use these visual analytics, when they are appropriate to use, and why it should matter to you. The course will deliver the knowledge necessary to integrate data visualization as a project component and identify the resources you need to be successful. A comprehensive review of best-in-class techniques aimed will equip you to integrate data-driven decision making and provide actionable insights through visual analytics.
  - Course delivery: 2-hour workshop
  - Delivery: In-person or virtual classroom

- **Tableau Server for Explorers**
  - This course is about empowering users who know the business to gain insight from trusted data sources, performing ad hoc analysis, modifying dashboards to fulfill identified needs and setting up processes which convert insight into action.
  - Course length: 4-hour workshop
  - Delivery: In-person or virtual classroom

# The Consumers

Your end-users, the Viewers, are often on-board with using visual analytics, but need guidance on what that really means and how to lead their team or dealerships through visualization projects. They're also the users with the least amount of time available for training so InterWorks has condensed the information they need to know in two short workshops.

| COURSE | July | Aug | Sept | Oct | Nov | Dec | Jan | Feb | Mar | Apr | May | June |
|--------|------|-----|------|-----|-----|-----|-----|-----|-----|-----|-----|------|
| **Tableau for Directors** |  | ● |  | ● |  | ● |  | ● |  | ● |  | ● |
| **Server for Viewers** | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● |

- **Tableau for Directors**
  - Explore the idea of visual analytics from a project perspective, diving into how you can use these visual analytics, when they are appropriate to use, and why it should matter to you. The course will deliver the knowledge necessary to integrate data visualization as a project component and identify the resources you need to be successful. A comprehensive review of best-in-class techniques aimed will equip you to integrate data-driven decision making and provide actionable insights through visual analytics.
  - Course delivery: 2-hour workshop
  - Delivery: In-person or virtual classroom

- **Tableau Server for Viewers**
  - The course will lead attendees on a journey through Tableau Server, ensuring there are comfortable with the User Interface. By the end of the workshop, users will be able to locate content, collaborate with colleagues and tailor their experience by managing subscription and creating custom views to maximize benefit from the published reports.
  - Course delivery: 2-hour workshop
  - Delivery: In-person or virtual classroom

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## The Community

Building and keeping an analytics community active is our goal. InterWorks will help motivate and inspire your organization by providing onsite/virtual seminars throughout the year.

| | July | Aug | Sept | Oct | Nov | Dec | Jan | Feb | Mar | Apr | May | June |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Office Hours** | | | ● | | ● | | | ● | | ● | | ● |
| **Webinars** | | | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● |
| **InterWorks Assist** | | | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● |

- **Office Hours**
  - We'll set aside a day and provide access to our experts for your team.
  - Your group will benefit from scheduled time blocks to get questions answered and quick problems solved.

- **Access to Our Exclusive Webinar Series**
  - The same folks that fill our blog with amazing content host regular online sessions.
  - These live webinars are offered exclusively to our clients and partners, so listen up and bring your questions!

- **InterWorks Assist**
  - Beyond our typical training courses, we also provide immediate ad hoc assistance with our global helpline: InterWorks Assist. We can quickly walk you through a solution and even teach you how to solve it yourself next time.
  - From simple strategic advice to complex calculation troubleshooting, Assist can be your lifeline when you need it.

# Frequent Connections with Your Account Team

Real-time access to your account team is a given. Using email, phone or #Slack messaging, they are ready to respond.

**Carly Capitula**
*Enablement Practice Lead*
carly.capitula@interworks.com

**Stephanie Hunt**
*Account Executive*
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# 2018-19 Enablement Plan

| QTY | Description |
|---|---|
| 2 | **Alteryx Designer Core** |
| | Up to 15 attendees each session |
| 2 | **Alteryx Designer Advanced** |
| | Up to 15 attendees each session |
| 2 | **Tableau Server for Admins** |
| | Up to 15 attendees each session |
| 2 | **Server for Creators** |
| | Up to 15 attendees each session |
| 2 | **Visual Best Practices for Analysts** |
| | Up to 20 attendees each session |
| 2 | **Tableau Desktop I** |
| | Up to 15 attendees each session |
| 2 | **Tableau Desktop II** |
| | Up to 15 attendees each session |
| 12 | **Tableau Server for Explorers** |
| | Up to 40 attendees each session |
| 6 | **Tableau for Directors** |
| | Up to 40 attendees each session |
| 12 | **Tableau Server for Viewers** |
| | Up to 40 attendees each session |
| | **InterWorks Assist Quarterly Subscription** |

# InterWorks Value Additions

**Ongoing Enablement for All Users**
Building and keeping an analytics community active is our goal. InterWorks will help motivate and inspire your organization by providing support throughout the year:
- Office hours
- Monthly webinars
- QA Prep Bootcamp (Desktop and Server)