

# Enterprise Data Sharing with Tableau

## Technology-enabled, Test Administration Company

Streamlines reporting and data visualization while keeping Salesforce users on platform

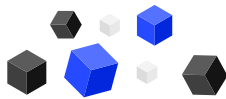
This company supports technology-enabled testing for many public and private sector customers, and the need for secure, remote exams continues to grow with the ongoing focus on virtual learning. Salesforce provided a system of record for the company that supported sales and service operations, and they adopted Tableau to support enterprise data sharing. CapStorm provided the replication speed and data control that the company required to provide near real-time visualization of Salesforce data with Tableau.

**Industry**  
> Technology

**Company Size**  
> 1001-5000

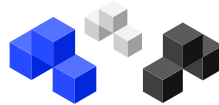
**Specialities**  
> Continuing Education  
> Technology  
> Analytics

**Tech Stack**  
> On-Premises Hosting  
> SQLServer  
> Tableau  
> Salesforce



### Problem

In addition to a high-frequency replication rate, data security and control were also paramount. To start, the organization wanted full transparency into the entire data flow from the initial extract from Salesforce to the final replication to Tableau. Salesforce contained sensitive data that needed to be kept internal and not exposed beyond the company's firewall. The organization also wanted sales and service teams to have visibility into the visualizations created in Tableau without leaving the Salesforce platform.



### Solution

CapStorm's CS:Enable product, powered by CapStorm's CopyStorm application, provided a fully incremental replication of the Salesforce's data and structure into the organization's self-hosted SQLServer database, enabling the company to gain full control. Simple queries to SQLServer generate targeted data views that are then connected to Tableau, resulting in segmented data control. This allowed the business to increase the data available for analytics on demand and in near real-time. In addition, Tableau Viz Lightning Web Components were used to embed Tableau visualizations into the Salesforce environment incentivising sales and support teams to stay on-platform.



### Outcome

The company transformed from limited data utilization, constrained by the native Salesforce report writer, to an enterprise data-sharing model. Subsequently, the company's new mode of data utilization allowed for the separation of data creation from data view and visualization in minutes. On top of this, CapStorm introduced a new approach for the company enabling citizen development with self-serve business intelligence, reducing the IT burden.

