

BEFORE YOU MIGRATE TABLEAU

## ~~Which reports can we delete?~~ is the *wrong* place to start.

We score every Tableau asset against your data model, KPIs, and grain — and hand you a prioritized action plan with evidence behind every call. Three weeks from kickoff to a signed migration backlog.

FROM A REAL ASSESSMENT

947	DASHBOARDS
11,203	FIELDS
~10%	REDUCTION
0	BAD MERGES

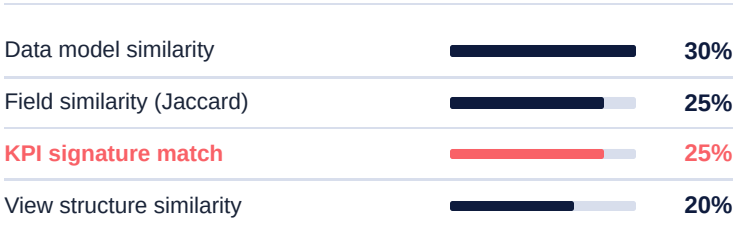
### 1 The three hard gates most teams skip

<p><b>01</b> <b>Same data model?</b></p> <p>Visual resemblance isn't enough. We compare table overlap, join structure, and cardinality — the actual foundation of the dashboard.</p>	<p><b>02</b> <b>Same KPI definitions?</b></p> <p>"Revenue" calculated two ways is a conflict, not a duplicate. Every formula is hashed and matched. Conflicts flagged before any merge.</p>	<p><b>03</b> <b>Compatible grain?</b></p> <p>Daily-level merged into transaction-level produces wrong aggregations. Grain mismatch is treated as a hard blocker, not a warning.</p>
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### 2 How the engine works — four stages, evidence-led

<p>01 · METADATA <b>Harvest</b></p> <p>Tableau REST + GraphQL pulls every workbook, dashboard, datasource, field, and lineage relationship.</p>	<p>02 · SIMILARITY <b>Score</b></p> <p>Jaccard overlap on fields, MD5-hashed KPI signatures, view structure, data model comparison.</p>	<p>03 · GUARDRAILS <b>Block</b></p> <p>Grain mismatches and KPI conflicts override the score. No unsafe merge ever gets recommended.</p>	<p>04 · OUTPUT <b>Decide</b></p> <p>Ranked backlog: KEEP, CONSOLIDATE, RETIRE, REDESIGN. Every call traces to its evidence.</p>
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### 3 The scoring model



**Hard blockers override the score.** Grain mismatch or KPI conflict? No merge is recommended — regardless of how high it ranks.

### 4 What the output looks like

<p><b>21</b> <b>REMOVE</b></p> <p>Exact view matches</p>	<p><b>59</b> <b>CONSOLIDATE</b></p> <p>High-overlap pairs</p>
<p><b>56</b> <b>RETIRE</b></p> <p>Low-usage duplicates</p>	<p><b>18</b> <b>REDESIGN</b></p> <p>Grain / KPI conflicts</p>

~115 dashboards of addressable reduction. Every call documented and owner-validated.

# A backlog you can execute against — not another report to read once.

Six deliverables. Three weeks. One source of truth for your migration plan.

## 5 Six deliverables

### 01 Full asset inventory

Every workbook, dashboard, datasource & database connection catalogued — with owners, usage and lineage.

### 03 Business glossary

Top fields & KPIs ranked by usage. Surfaces the de facto vocabulary that should be formally certified.

### 05 Prioritized action backlog

Every dashboard classified — KEEP, CONSOLIDATE, RETIRE, REDESIGN — with the evidence behind each call.

### 02 End-to-end lineage graph

Three-layer view: raw tables → calculated fields → presentation. Impact analysis becomes one click.

### 04 KPI conflict report

Every metric with the same name but a different formula. Standardization required before consolidation.

### 06 Owner validation prompts

Generated questions for every business decision. The work to approve is structured, not improvised.

## 6 Three weeks from kickoff to signed backlog

### WEEK 1

#### Connect & harvest

Personal access token configured. Tableau Server or Cloud metadata extracted via REST and GraphQL APIs. Lineage graph built.

### WEEK 2

#### Score & validate

Similarity engine runs. Guardrails applied. Initial backlog generated. KPI conflicts and grain mismatches surfaced for review.

### WEEK 3

#### Decide & ship

Owner validation prompts circulated. Final action backlog signed off. Migration plan prioritized by evidence, not opinion.

## 7 Why this isn't another BI audit

### A TYPICAL BI AUDIT

~~A list of duplicates and a summary slide.~~

**A ranked action plan with KEEP / CONSOLIDATE / RETIRE / REDESIGN decisions and traceable evidence.**

### TABLEAU DATA CATALOG

~~A passive inventory of what exists.~~

**A decision engine on top of the metadata — telling you what to do, not just what's there.**

### VIEW-COUNT RATIONALIZATION

~~Delete what no one uses. Hope for the best.~~

**Detects duplicates under different names, plus the KPI conflicts and grain mismatches that view counts miss.**

**Stop guessing.  
Start with evidence.**

Book a 30-minute scoping call. We'll walk through a sample report and outline what an assessment of your environment looks like.

Get in touch