Using Tableau for CX and Support Analytics Training Course

Professional Development Training Course Outline

Category	Customer Service and Customer Experience	**Duration**	5 Days
Base Fee	$1,500 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

In today’s hyper-competitive business landscape, delivering exceptional customer experiences (CX) and optimizing support operations is critical for sustained growth. Data-driven decision-making has emerged as the backbone of successful CX strategies, and Tableau is the industry-leading analytics platform empowering organizations to transform raw data into actionable insights. Using Tableau for CX and Support Analytics Training Course equips professionals with the skills to harness real-time dashboards, predictive analytics, and interactive visualizations, enabling businesses to identify pain points, improve customer satisfaction, and boost support efficiency.

Participants will gain hands-on experience in leveraging Tableau for customer journey analysis, ticket resolution trends, sentiment analysis, and key performance indicator (KPI) tracking. Through practical exercises, case studies, and industry-specific scenarios, learners will master techniques to transform support data into strategic insights, reduce response times, and enhance overall CX performance. By the end of the course, attendees will be proficient in data blending, storytelling with dashboards, advanced calculations, and predictive modeling, positioning themselves as data-driven CX leaders.

Programme Curriculum

Using Tableau for CX and Support Analytics Training Course

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Course Duration

5 days

Course Objectives

By the end of this course, participants will be able to:

1. Create interactive Tableau dashboards for real-time CX monitoring.
2. Perform customer sentiment and feedback analysis using Tableau.
3. Track and visualize support KPIs for faster decision-making.
4. Leverage data blending and integration to unify multi-source support data.
5. Conduct ticket volume trend analysis for resource optimization.
6. Apply predictive analytics to forecast customer behavior and support demand.
7. Develop customer journey analytics dashboards for strategic insights.
8. Use advanced calculations and LOD expressions to measure CX metrics.
9. Implement self-service analytics for support teams and stakeholders.
10. Optimize response times and ticket resolution efficiency using Tableau.
11. Build storytelling dashboards to communicate insights to executives.
12. Conduct root cause analysis on recurring customer issues.
13. Integrate AI-powered analytics features for proactive CX improvements.

Target Audience

1. CX managers and leaders
2. Customer support managers
3. Data analysts focusing on CX and support
4. Business intelligence professionals
5. Operations managers in support functions
6. Digital transformation consultants
7. IT professionals supporting analytics initiatives
8. Aspiring data-driven CX strategists

Course Modules

Module 1: Introduction to Tableau for CX Analytics

- Overview of Tableau and its applications in CX and support
- Understanding data visualization principles
- Connecting to various customer and support data sources
- Case Study: Retail company visualizing customer feedback trends

- Creating your first CX dashboard

Module 2: Data Preparation and Integration

- Data cleaning, transformation, and preparation techniques
- Combining multi-source datasets for holistic analysis
- Using Tableau Prep for support analytics
- Case Study: Telecom company integrating ticketing and CRM data
- Data blending for multi-channel support analysis

Module 3: KPI Tracking and Support Analytics

- Identifying critical CX and support KPIs
- Visualizing ticket resolution trends and response times
- Building operational dashboards for support teams
- Case Study: SaaS company reducing average ticket resolution time
- KPI dashboard creation

Module 4: Customer Journey and Sentiment Analysis

- Mapping customer journeys using Tableau
- Analyzing feedback and sentiment data
- Measuring customer satisfaction (CSAT, NPS)
- Case Study: E-commerce platform improving post-purchase experience
- Journey analytics dashboard

Module 5: Advanced Calculations and LOD Expressions

- Using calculated fields and table calculations
- Level-of-detail (LOD) expressions for detailed insights
- Scenario-based analytics for CX and support
- Case Study: Financial services company segmenting support requests
- Advanced calculation exercises

Module 6: Predictive and AI-Powered Analytics

- Forecasting ticket volumes and customer behavior
- Applying trend analysis and predictive models
- Introduction to Tableau’s AI analytics features
- Case Study: Travel company predicting peak support periods
- Forecasting and prediction in dashboards

Module 7: Dashboard Design and Storytelling

- Best practices for dashboard visualization
- Storytelling techniques for executive presentations
- Interactive dashboards for actionable insights
- Case Study: Healthcare provider presenting CX performance to leadership
- Building a storytelling dashboard

Module 8: Real-Time Analytics and Self-Service Insights

- Creating live dashboards for ongoing monitoring

- Enabling self-service analytics for support teams
- Automating alerts and notifications
- Case Study: Tech company implementing real-time support monitoring
- Real-time CX dashboard creation

Training Methodology

This course employs a participatory and hands-on approach to ensure practical learning, including:

- Interactive lectures and presentations.
- Group discussions and brainstorming sessions.
- Hands-on exercises using real-world datasets.
- Role-playing and scenario-based simulations.
- Analysis of case studies to bridge theory and practice.
- Peer-to-peer learning and networking.
- Expert-led Q&A sessions.
- Continuous feedback and personalized guidance.

Register as a group from 3 participants for a Discount

Send us an email: info@fineskilltrainingcenter.org or call +254769199797

Certification

Upon successful completion of this training, participants will be issued with a globally- recognized certificate.

Tailor-Made Course

We also offer tailor-made courses based on your needs.

Key Notes

a. The participant must be conversant with English.

b. Upon completion of training the participant will be issued with an Authorized Training Certificate

c. Course duration is flexible and the contents can be modified to fit any number of days.

d. The course fee includes facilitation training materials, 2 coffee breaks, buffet lunch and A Certificate upon successful completion of Training.

e. One-year post-training support Consultation and Coaching provided after the course.

f. Payment should be done at least a week before commence of the training, to Fineskill Training Center account, as indicated in the invoice so as to enable us prepare better for you.

Upcoming Scheduled Sessions

Start Date	End Date	Location	Price

23 Nov 2026	27 Nov 2026	Online	$1,000
23 Nov 2026	27 Nov 2026	Physical	$1,500
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$4,500
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$6,000

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