Software delivery

Signs the spreadsheet is now the bottleneck

From the field note "Your business runs on spreadsheets. When to replace them with software, and how".

The short version

- Replace a spreadsheet when it has become a shared system people work in, not when it is merely big. The signs are version conflicts, copy-paste between sheets, no record of who changed what, and permissions you can't enforce.
- Keep spreadsheets for analysis, one-off models and exports. Move the shared records and the steps around them into software.
- Map the workflow and define the data model before anyone builds screens. Most of the hard decisions hide in the columns.
- Import and reconcile historic data, run old and new side by side for a full cycle, then switch over on a set date and lock the old sheet.
- A well-built spreadsheet is sometimes enough. If one person owns it and the stakes are low, tidy it up instead.

The checklist

- [ ] Version conflicts: "orders_final_v3_JM.xlsx" exists, and people argue about which copy is right.
- [ ] Manual copy-paste: data moves between sheets or tabs by hand every day or week.
- [ ] No audit trail: when a number changes, nobody can say who changed it, when or why.
- [ ] Permissions you can't enforce: everyone who can see prices can also edit them.
- [ ] Formula errors: a broken reference or a sorted range silently changes totals.
- [ ] One person holds it together, and holidays are a risk.
- [ ] Approvals happen in email or chat, then someone updates the sheet afterward.

Want a second pair of eyes on your answers?

Book a free 30-minute discovery call at www.seriustech.com/contact or email contact@seriustech.com. We reply within 1 business day.

Read the full note with examples and sources at www.seriustech.com/blog/replace-spreadsheets-with-custom-software. © SeriusTech.