sales-i
SELL SMART

For and against:

Are spreadsheets still useful in business today?

Who is sales-i?

We're the leader in sales performance for manufacturers, distributors and wholesalers.

sales-i is designed to make every sales call more personal and profitable. sales-i enables sales professionals to clearly identify and target high-quality sales opportunities within their current customer base. Equipped with customer buying behavior alerts, salespeople can make insightful, personalized, quick business decisions, realizing repeat sales, reduced customer attrition and maximized profit margins as a result. sales-i will change the way you sell. Get in touch for a free, online demonstration and judge our software for yourself.

www.sales-i.com
tellmemore@sales-i.com

"

sales-i has become an integral part of our everyday business operations, it gives me a management tool for overseeing productivity that our company has never previously had.

- Tim Gray

Introduction

With an estimated 750 million people using Excel, it's safe to assume that the use of spreadsheets is firmly cemented into our daily lives. However, as successful as the spreadsheet has become, it's becoming phased out by other solutions.

Should you still be using them for your business?

In this eBook, we've collected the facts and weighed the pros and cons and highlighted the pros and cons, so that you can come to the conclusion about whether spreadsheets are still useful in your business today.

Enjoy!
The sales-i team.

Negatives

We've mixed it up slightly by starting with the negatives. After all, that's why you downloaded this eBook, right?

Errors here, errors there, errors everywhere

You may be in charge of your team or company, but your business data is driving your decision-making. That makes knowing, and trusting, the data you have vital to your success. However, according to a study carried out by Forbes, 88% of spreadsheets contain at least one error. This means that nine out of ten spreadsheets in your company right now contain spelling mistakes, miscalculations or formatting errors.

That's a worryingly high number from one of the most used pieces of business software in the world - especially when you rely on them to make critical business decisions.

Most spreadsheet apps don't provide automatic calculation functions that check for human error.

Here's an example:
A staff member at the 2012 London Olympics (story here) incorrectly input the number of available seats as 20,000 rather than 10,000. Therefore, 10,000 tickets were oversold causing a multitude of problems and a few angry sports fans!

It's complicated

It's common knowledge that everyone can use spreadsheets, right? Wrong. Ask yourself, how many people in your company have had any formal training on spreadsheets? I'm guessing it's either none or very few, yet everyone is expected to be able to calculate formulas, create pivot tables, insert macros and so on. In truth, they can't.

Spreadsheet software has become a tool for everyone, not just a single department such as finance. As such, the software has been crammed full of features that are either too difficult to understand or hidden beyond sight, turning it into 'bloatware'.

Have you ever tried to run an index match? I thought not. But if you did, this would be the formula:

=INDEX(C2:E5,MATCH(B12,C2:C5,0),MATCH(B18,C3:E8,0)).

Why can't there just be a big green button to press?!

	A	B
1	=INDEX(C2:E5,MATCH(B12,C2:C5,0),MATCH(B18,C3:E8,0))	
2		

Pretty confusing eh?

Sharing woes

Sharing a spreadsheet internally or externally is probably one of the most frustrating issues you'll face. Picture the scenario, you spend five hours crafting and nurturing the most incredible spreadsheet known to mankind. Everything is fine, until you need to share it with others for review. You send it to three different people but because they can't make live updates (unless you use the awful Google Docs or Office 365) the document has to be passed from one team member to the next… and then to the next. Hopefully, each person has updated the spreadsheet correctly without errors (see point one) before it gets back to you.

Your perfectly phrased document file name is now a Frankenstein name. Does this file name seem familiar to you?

X Critical_planning_figures_2018_AB_SF_ND_CB_ final1_final-2_FINAL-FINAL.xlsx

Even worse they could save multiple versions to a shared folder, so you have no idea which is the most up to date, bringing us to the next point.

Lack of version control

In its simplest form, version control is the task of keeping your document versions well-organized and consistent so that you can find the right information quickly.

Most software gives you no help in this arena as multiple versions can be saved with similar names. Think about how many times you've searched your PC's folders, opening each spreadsheet file to see if it's the correct one, only to realize that yet again it's not. Not only are you wasting time (the next point in the list), it's becoming a major ongoing distraction.

Take this example:

Gary, a consultant working on behalf of Bourne Enterprises Inc, asks for their performance scorecard. Bourne Enterprises sends him three Excel documents, one managed by their executive team, one by the sales team and one by the project management office. None of the files had the same objectives or measurements in them. The outcome is that the organization is struggling to fully execute their strategy as each department is using different versions of the scorecard that had been amended over the course of the year.

Time-consuming

According to research conducted by Ventana (a research house providing guidance to help businesses improve efficiency) states spreadsheet users spend 12-18 hours each month maintaining their business spreadsheets. This includes data cleansing, updating, revising and consolidating information. This research isn't limited to a certain type of business or industry; it covers small-to-medium businesses right up to large enterprises. Furthermore, the research shows that senior management also get bogged down in spreadsheet hell!

The assembly of data is time-consuming even before any analysis has begun. Ventana reports that to answer just one question, 81% of professionals are combining five spreadsheets, and 75% of employees are not analytical enough to handle processes quickly or, more importantly, accurately. This results in wasted time for inaccurate reports – what's the point?

Compiling spreadsheets means you're burning through salaries, losing precious time and resources to concentrate on other business-critical activities and let's face it: business spreadsheets aren't the most enjoyable and motivating aspect of a working day.

GDPR (un)compliant

The GDPR has changed the way that countries in Europe manage their data. It definitely hinders productivity, but when it carries a fine of up to €20 million or 4% of turnover for data breaches, it's something you need to take note of.

Spreadsheets are possibly the worst offending files for data leaks. How many times in the news have you heard about a laptop being left on a train where personal data has been lost? This is the problem with spreadsheets: they can hold large quantities of personal data that is saved to a hard drive, separate to any secure company drive. There is a very good reason why most B2B software has permissions that don't allow everyone to export data to .xls or .csv.

There are ways to solve this problem by implementing software that can erase data from laptops and smartphones remotely such as Absolute Computrace. However, you'll probably need an IT expert to maintain the system and pay a monthly cost for the service.

Security issues

To go one step further than the GDPR on the issue of security, the data held in a spreadsheet may not be suitable for everyone in your business to see. For instance, HR information such as commissions, social security numbers and home addresses shouldn't be widely accessible to every employee.

Most spreadsheet software does allow you to add a password to protect it, however, this allows people to see the whole spreadsheet or be blocked entirely. For obvious reasons, this isn't ideal for when employees need varying degrees of access.

Finally, spreadsheets aren't associated with any accounts or contacts so they cannot give you insight into who is viewing them and when. All it takes is for your password to fall into the wrong hands and you'll have a monumental data breach. Let's hope your employees are as trustworthy as you hope they are.

Mobile access

The number of mobile phone users in the world is set to exceed 4.58 million this year, according to Statista. Like it or not, we're a mobile-first world and every application you use needs to be accessible and easy-to-use on a mobile device – including spreadsheets. Have you ever tried to view a spreadsheet on a small screen? It's painful.

Mobile access to sales systems has been proven to increase the productivity of sales reps by as much as 24%, according to some estimations. But regardless of the other virtues of spreadsheets, their mobile unfriendliness is a huge negative. Dragging out a laptop each and every time you need to enter or change customer data gets old in a hurry.

4.58m
Mobile phone users
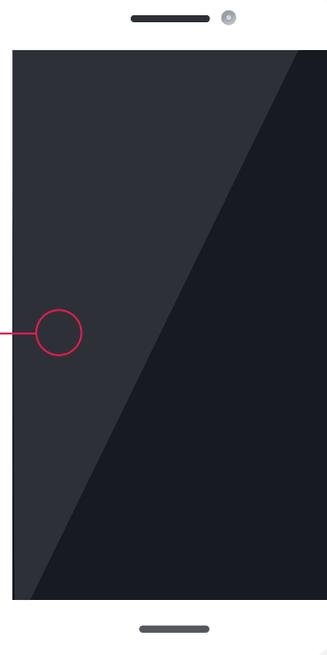
No single purpose in mind

In the early days of spreadsheets, they did adhere to a main purpose – the analysis and storage of data. However, their early success has turned it into a tool for every department – no unique identity and no single purpose. It's become a cumbersome tool that fails to excel (pun intended) in any one feature.

As soon as you lose the core positioning of the software it becomes satisfactory at a whole host of tasks, rather than excellent at a single one.

Modern software is designed to integrate with specialist tools. This makes using a suite of individual software applications a better option for businesses than trying to force one to serve every need.

Examples where a task uses software it's not intended for:

Mass email

You should never use MS Outlook for mass email. So many emails are sent where other recipients email addresses have been included in the CC field. Not only is this classified as a data breach, but you'll also be annoying every recipient. Use software that's designed specifically for this task such as MailChimp, HubSpot or Constant Contact.

Storing contact data

Spreadsheets aren't the best option here, neither is your email client. They are anti-collaborative by storing data in silos. Any business that captures contact data should use a CRM system, which will not only secure your data but make it easier to segment, edit and share your data with colleagues. The CRM market is massive and you should consider software such as Salesforce, SugarCRM or sales-i.

Data visualization

Creating graphs to visualize your dat a is a great way to under-stand trends and simplify your data analysis. Spreadsheets can do this, but are difficult to adjust the figures ad-hoc and can be time-consuming to create. It's better to use data visualization software such as Tableau, PowerBI or Plotly.

'Sorry an error has occurred'

We've all been there, you've been working on a spreadsheet for hours and suddenly... you get the spinning wheel of death, followed by the program shutting down saying 'an error has occurred'. Usually, users go through a similar state to the five stages of grief – denial, anger, bargaining, depression and acceptance.

Denial
'I haven't lost my work, it will be saved somewhere, surely?'

Anger
'I hate you Excel.'

Bargaining
'Please Excel, I'll do anything for you to recover my work.'

Depression
'I've literally lost 3 hours of my time that I can never get back. I'm so sad.'

Acceptance
'I need to complete this work today, I had better start again.'

Incapable of supporting quick decision-making

We have become a data-driven world. Everything from grocery stores to watching TV has been designed based on data analysis. Having the ability to analyze data quickly and react to fast-paced market conditions is what separates successful businesses from their competitors. Unfortunately, spreadsheets are too weighty and clunky to provide quick decision-making.

For example:

Imagine that you need to find out what a customer's spending habits are. You want to understand whether your largest customer, Bob's Auto Supplies' drop in sales this July has been consistent with previous years against a certain product such as brake discs and pads. Using spreadsheets will give you the answer but it will take time to discover and digest the information. By this time, the problem month may have passed and so too has your opportunity to sell brake parts in July.

Formula over function

=IF(AND(C2>=C4,C2<=C5),C6,C7)

=SUM(B4:OFFSET(B2,0,E2-1))

=CHOOSE(choice, option1, option2, option3)

=COUNTIF(D5:D8,">=14")

=LEN(text) and =TRIM(text)

Don't worry, your computer hasn't crashed, it's just a list of popular formulas that are used in Excel. From a long-term perspective, some of these formulas are useful, but it requires a lot of time and effort to learn them. Generally, most people will go and find their company's Excel wizard to write the formulas for them – not a great use of their time.

Some files are incompatible

We all use different software to create spreadsheets, from Excel to OpenOffice and more. As competing products, sometimes a file saved in one program may not be accessible by another. There are some spreadsheets which are proprietary in their file extensions and can only be read by the program or app that created them.

Spreadsheet software can be costly

Some spreadsheet software is free such as:

○ OpenOffice

○ Kingsoft

○ Gnumeric

○ Numbers

○ Spread32

Whereas others are paid:

○ Quip - $25 per month

○ MS Office – from $10 per month

○ G Suite - $5 per month

○ Zoho – from $3 per month

Bear in mind that the above packages are minimum costs too. For instance, to get all the features in MS Office along with a downloadable program instead of using it purely online will cost an additional $30 to make it $40 per month per user. This is an important facet to consider, depending on your usage.

Data 'slowcessing'!

Spreadsheets aren't particularly good at data processing. As soon as you have a large dataset, it will slow down and require a high-powered PC to complete the task in a reasonable time.

Excel currently supports 1,048,576 rows by 16,384 columns. Great for most day-to-day tables but nowhere near enough for Big Data analysis (which is the path all businesses are taking in the current climate).

Example:

As CEO, you want to analyze your past year's invoices to identify which products are best sellers and which contribute the most profit to your business. If you're a wholesaler, you'll probably have thousands of products being sold to thousands of customers. If this is the case, your dataset may run into the millions or even billions! Suddenly Excel is pointless.

Your data is siloed with no visualization

We now live in a fast-moving, data-rich world where data is combined for easier collaboration and visualization, think dashboards and fancy graphs. Spreadsheets keep data separate due to files not being located on a single system so restrict data visualization.

Sure, users can create charts and graphs in spreadsheets, but 'create' is the key word here. They're time-consuming, fixed at a certain dataset and don't offer enough ways to portray data.

Our brains process a large quantity of data every second, but we're more geared for visual processing than numerical. We can process a visual scene ten times faster because fifty percent of our brains are wired to do just that.

❝

You remember 80% of what you see, 20% of what you read and 10% of what you hear.

- Search Engine People

You wouldn't use a hammer to fasten in a screw, so don't use spreadsheets for data visualization. Use the right tool for the task at hand.

Know your question

Every spreadsheet tool is reactive. This means that you need to know what you want to ask before you can get the answer.

This may sound simple, but in reality, it's not. You may not know that XYZ Inc has stopped buying from you for the past 3 months or that product A is never sold with product B. Spreadsheets will only work if you can filter based on a question in mind. It cannot automatically tell you the answer to these questions based on machine learning.

Drilling is not allowed!

In most cases, you'll need to drill down into your data to discover business-critical information. Much like drilling for oil, the deeper you drill, the more money you'll make!

For example, you may want to find out which customer and sales rep is specifically responsible for your flagship product selling in low numbers last month. Ideally, this will be your drill trail:

Building products ($2.5m) > Plaster and Boards ($400k) > Wallboard 2400x1200x12.5mm ($79k) > Chicago Branch ($25.5k) > Customer – Evans Inc ($5k) > Sales Rep – Bob Kennedy ($4k)

From this drill trail you can see that Bob Kennedy has only sold $4k worth of wallboard to Evans Inc last month instead of their usual $15k. Armed with this information you can discover the reasons why and rectify this issue.

Unfortunately, spreadsheets do not make it easy to drill up and down through the trail based on this criteria.

Maaaan, they're ugly

Spreadsheets are function over form. Even a mother couldn't love them they're so ugly with their boring, endless cells and lack of color.

As mentioned previously, humans are hard-wired to process information faster from visual stimuli. A cell with a few words isn't the most stimulating.

Even the graphs are so visually unappealing unless you spend hours customizing them – which is not a great use of your time.

Positives

So far, this eBook may seem like it has a grudge against all things 'spreadsheety', but they do have their positives too.

It's easy to make multiple calculations

The whole point of spreadsheets is to calculate values quickly and easily. Using equations and formulas, you can set cells to calculate data for you in a number of ways. This makes it easier to create totals or tallies that can be used for monitoring, analysis or create other data points that are necessary to your business.

The newer versions of spreadsheet software include some pre-formatted formulas requiring the user to have less knowledge if they want to insert functions such as 'sum', 'average', 'IF' or 'count'.

Here's an example:
In accounting, you could use the 'IF' statement for discovering which salespeople have exceeded $5,000 in sales in a week and therefore give them 0.5% of the total sales value as commission. This calculation would be:

=IF(A1>5000, cell A3*0.05, 0)

Once set up they're easy to change

You can merge cells, add columns or rows and expand cells. Spreadsheets can be adapted quickly to any changes you need to make.
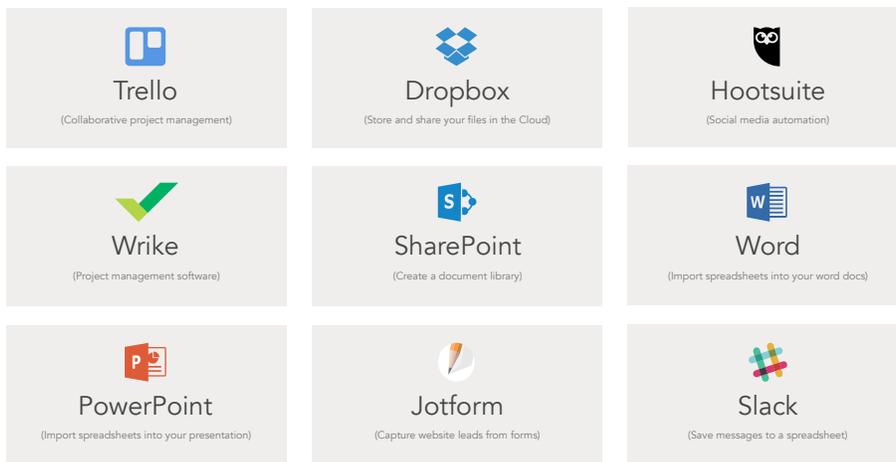
Most people are able to use spreadsheets to a basic level, which means that users can amend or add new content easily.

Spreadsheet software also has a good feature that allows you to change the values in a cell to any format such as percentage, currency, add decimal places, plain text and more. This can be very useful when you need to update many cells at once.
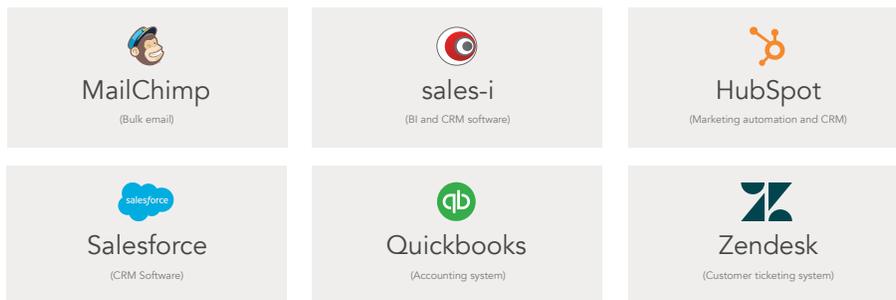
Integrations galore

Spreadsheets have been around since Medieval times and with one in seven people in the world using them, it's no wonder there are many third-party applications to support them.

The below is a list of value-add integrations:

Trello (Collaborative project management)	**Dropbox** (Store and share your files in the Cloud)	**Hootsuite** (Social media automation)
Wrike (Project management software)	**SharePoint** (Create a document library)	**Word** (Import spreadsheets into your word docs)
PowerPoint (Import spreadsheets into your presentation)	**Jotform** (Capture website leads from forms)	**Slack** (Save messages to a spreadsheet)

There are many software solutions that allow spreadsheets to import data into them via a bulk upload. Below are just a few:

MailChimp (Bulk email)	**sales-i** (BI and CRM software)	**HubSpot** (Marketing automation and CRM)
Salesforce (CRM Software)	**Quickbooks** (Accounting system)	**Zendesk** (Customer ticketing system)

To put it simply, the data stored in spreadsheets can be used to power a lot of other business solutions through integrations.

Data is organized

Nobody has ever questioned a spreadsheet's ability to organize data into conceivable categories. The cell structure of letters for columns and numbers for rows make it easy to pinpoint one area or to select a wider region.

	A	B	C	D
1				
2				

The 'letters' for columns and 'numbers' for rows makes data entry easy.

Visual representations can also be included to help understand the data better, including graphs and charts, so that more time can be spent using the data instead of trying to figure it out.

Multiple spreadsheets, one file

The tab structure within spreadsheet software makes it easy to combine multiple spreadsheets into a single file. If you wanted to keep track of your sales team's commission, you could create a running record in a spreadsheet for an entire month's worth of payments. You could then put all 12 months of the year into one overall spreadsheet file, allowing you to easily tab through individual monthly spreadsheets.

| ◀ ▶ | January | February | March | April | May | June | July | August | September | October | November | December | + |

Each spreadsheet can connect to another. For example, one could be a database of data driving each formula.

Online updates

Through certain products such as Office 365 or Google Docs, your spreadsheets can be created or amended offline and online. This is most useful when you use multiple devices to access a single file or when you want the peace of mind that your file is saved securely in the Cloud.

Any changes you make to your spreadsheet online are usually autosaved over the top of your existing file.

To bear in mind:
If you need to save your existing data before you make changes, it's best to clone your spreadsheet and save it in a different name.

They're mobile (sort of)

Mobile access has been mentioned previously as a negative and for the most part, it is simply due to the screen size of devices. But… you can still access them. If you need to view or edit a spreadsheet urgently and you only have your mobile device, you can access your file.
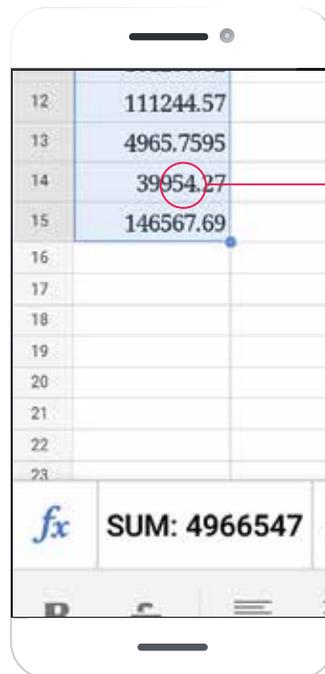
12	111244.57
13	4965.7595
14	39054.27
15	146567.69
16	
17	
18	
19	
20	
21	
22	
23	

fx SUM: 4966547

Functional, but not user friendly

They're a universal file format

Much like PDFs, .xls, .xlsx, .csv or .txt can be opened by most programs. This availability has been one of their points of success. The familiarity and availability of spreadsheets have cemented it as the 'first thought' for most people when they need to create a document.

Excel was the main driver of the universal format as it's included with the Microsoft Office Suite. As over 1.4 billion computers worldwide run on Windows, it's no surprise that Microsoft can sell the Office Suite in great numbers due to one of the easiest cross-sell opportunities today – you buy Office because it's intended to work on Windows.

Microsoft Office Suite doesn't just stop with Windows devices either. You can download and run it on iOS and Android devices also – even though they have their native spreadsheet software too. This ensures that no matter your device or operating system, you'll still be able to open your spreadsheet.

This just shows how renowned the Excel brand is to business users, students and home workers alike.

Spreadsheets are a database's best friend

Moving away from the accounting team or sales department, spreadsheets can be very useful for your IT department too. Most (if not all) businesses today will have some sort of database where data is stored and the most common way of communicating with that database is a language known as Structured Query Language or SQL for short.

A few examples of where SQL is used to communicate with databases are:

○ Oracle
○ Sybase
○ Microsoft SQL Server
○ SQLite
○ MySQL
○ Postgres

Why is this important to spreadsheets? Because nearly all databases will be a table with rows and columns which is created by spreadsheets. This structure allows developers and programmers to 'pull' data from the database source to use in other systems or to filter it for informed decision-making. If a change were to be made in the database it would reflect across all systems using that information, rendering your spreadsheet the master system for your business' data.

Alternatives to spreadsheets

As mentioned throughout this eBook, spreadsheets have both positive and negative effects on business. They may not be the best tool for the job and it's worth exploring other options depending on what you want to achieve.

There are software solutions available right now that eliminate the time, cost and errors of generating valuable business information. 72% of senior management would like to mine data and generate reports for themselves, without the reliance on IT or other departments. Senior management needs the ability to take action with the most accurate, current information without waiting for reports to be updated.

Business Intelligence Software

What is it?

Business Intelligence systems provide you with an architecture to analyze data and reveal actionable insights that can help improve decision-making and inform business strategy.

Why replace spreadsheets?

Spreadsheets consume data from many sources and display it into actionable insights via graphs, tables and benchmark visualizations. Business Intelligence software is able to analyze more rows of data than spreadsheets in a fraction of the time.

Vendors to consider

- sales-i
- Tableau
- Domo
- InsightSquared
- PowerBI

Customer Relationship Management (CRM)

What is it?

A CRM system helps businesses track and manage sales, marketing and customer support interactions in a single platform. A CRM will record interactions between your business, prospects and existing customers.

Why replace spreadsheets?

There's a stat that's been bandied around for years that a CRM system will add about 25% to a company's value compared to if they don't use one. The reason being that all data is stored in a single place, previous interactions are noted, and contact data can be segmented. This data is the lifeblood of a business and investors would like to know that they are buying into a company with this intact. Spreadsheets won't give your business the same value.

CRM systems are also useful if multiple people need to work on a record and if management needs to report on activity or performance.

Vendors to consider

- Salesforce
- sales-i
- HubSpot
- Zoho
- SugarCRM

Sales Performance Software

What is it?

Also classified as sales intelligence, sales performance software helps companies use internal and external data to increase sales and improve sales processes. This is a varied category of software providers ranging from data scraping tools to proactive opportunities created from invoice data.

Why replace spreadsheets?

Spreadsheets simply can't give you the information salespeople need in real-time to take advantage of them. Spreadsheets are great for storing data, but sales performance software helps drive new leads, segment prospects and customers through

custom criteria and display all information regarding your contacts.

Vendors to consider

- ZoomInfo
- sales-i
- Hoovers
- LinkedIn Navigator
- InsideView

Accounting Software

What is it?
Accounting software helps businesses streamline and automate finance management processes. This helps companies ensure their books are accurate and cuts down on the time it takes for recurring processes such as invoicing and reconciliation.

Why replace spreadsheets?
Accounting software removes the need for a lot of manual calculations and streamlines invoicing and payroll. Spreadsheets cannot automate accounting processes in the same way and can't manage cash, bank accounts and payment methods. Every business needs some sort of accounting software.

Vendors to consider

- Quickbooks
- Xero
- Sage
- SAP
- Microsoft Dynamics 365 for Financials

Data Visualization

What is it?

Data visualization software translates data and metrics into charts and graphs to help companies track business metrics and key performance indicators (KPIs) in real-time so they can better understand performance and goals.

Why replace spreadsheets?

Data visualization software allows users to create dashboards that track KPIs and trends without needing technical skills.

This software, like Business Intelligence, can pull data from multiple sources such as CRM and accounting systems and mash it into a single view. This coupling of data provides greater visibility into your company's performance.

Vendors to consider

○ Google

○ Looker

○ Plotly

○ iDashboards

○ Databox

Expense Management Software

What is it?

Expense management software allows you to process, pay, and audit employee-initiated expenses.

Why replace spreadsheets?

A huge amount of companies will use spreadsheets for their expenses but is a manual process and each claim is a separate file. With expense management software, you can reduce administrative effort, track and report on employee expenses and remove the paper-trail.

Vendors to consider

○ WebExpenses

○ Expensify

○ Paycom

○ Zoho Expense

So, should you continue to use spreadsheets?

Imagine spreadsheets as oil to a motor vehicle. It's tried and tested and gets you from A to B fairly effectively, however, oil is being replaced by electricity. It's a cleaner, simpler and more reliable way to effectively achieve the same outcome – traveling from A to B.

Spreadsheets do still have a place in today's business world but they need tighter controls on how they should be used, who has access to them and where data should be stored. Without these controls, it's very easy for the management team to lose sight of how the business is actually operating. You'll inevitably end up with multiple views of the truth. Used correctly though they should be supporting files to help enrich and power new software tools whether that be through an integration or manual import.

It's a huge challenge to remove spreadsheets from your business overnight. Instead, try to replace one department/element at a time. For example, for management reporting use a BI tool and set that up to work for you. Once completed you can start to implement a CRM system and so forth. This drip approach will ensure your business is travelling down the right path and won't hinder productivity by trying to change too much too soon.

Sources

Over 750 million use Excel worldwide: https://excelwithbusiness.com/blog/microsoft-excel-versus-apples-numbers-who-prevails/

88% of spreadsheets contain significant errors: https://www.forbes.com/sites/salesforce/2014/09/13/sorry-spreadsheet-errors/#20580e9256a

Users spend 12-18 hours each month maintaining their business spreadsheet: https://www.replicon.com/when-it-comes-to-spreadsheets-get-out-of-your-comfort-zone

4.57 million mobile phone users in the world in 2018: https://www.statista.com/statistics/274774/forecast-of-mobile-phone-users-worldwide

Employees spend approximately 12 hours each month consolidating, modifying and correcting spreadsheets: https://searcherp.techtarget.com/news/2240204044/Top-five-dangers-of-using-spreadsheets-in-finance

1.4 billion computers run windows and 1.3 billion run iOS/MacOS: https://en.wikipedia.org/wiki/Usage_share_of_operating_systems

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www.sales-i.com
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Request Demo >