Practical guide

Spreadsheet-run businesses — when to systemise

A practical guide for owner-managed UK businesses on when spreadsheets have stopped helping and started hiding risk — and what to do before anyone buys software.

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Spreadsheets are excellent tools. Most owner-managed businesses would be slower without them. They become a problem when they stop being a tool and become the *operating system* of the company: stock, orders, supplier chasing, margin, forecasting — all in files that only one person fully understands.

If you run the business without a CTO, that line is easy to cross. A sheet that once saved time quietly becomes the place where risk hides.

When a spreadsheet is still the right answer

Keep the sheet when:

- One person owns it and others only read a published view
- The process is occasional, not live trading every hour
- Errors are annoying, not customer-facing or cash-critical
- You can explain the logic on one page
- Version history and backups are deliberate, not accidental

Plenty of healthy businesses still use Excel or Google Sheets for planning, pricing scenarios and one-off analysis. That is not a failure. That is judgement.

Warning signs you have outgrown the sheet

The shift usually shows up in operations before it shows up in a board pack:

- The same numbers are re-typed into two or three places
- Month-end, despatch or purchasing depends on one person being available
- Mistakes only surface when a customer complains
- Nobody trusts the “master” file — so people keep private copies
- Two sheets disagree and nobody can say which is true without a meeting

- Growth has made the sheet slower, more fragile, or more political

If several of those are true, you do not necessarily need an ERP tomorrow. You do need to stop pretending the spreadsheet is still a harmless convenience.

What the business is really paying for

The cost is rarely the Microsoft licence. It is:

- Hours spent reconciling instead of serving customers
- Key-person risk when the “sheet person” is on holiday
- Decisions made on numbers that felt right yesterday
- Workarounds that become tribal knowledge
- Delayed fulfilment, wrong stock buys, or awkward credit notes

Write those costs down in plain English. That list is more useful than any vendor feature matrix.

What not to do first

Do not buy an ERP, WMS or “all-in-one platform” because a salesperson said you have outgrown Excel.

Do not migrate live trading onto a new system while the process is still unclear.

Do not ask AI to “fix the spreadsheet problem” if the underlying issue is conflicting ownership of data.

First understand the work: who touches the sheet, what decisions it supports, which figures must be right every day, and which only matter monthly.

A safer sequence

1. **Map the work and the hand-offs** — not the columns, the people and the moments that matter
2. **Separate daily truth from monthly reporting** — stock and open orders are not the same kind of problem as a forecast
3. **Fix the worst friction first** — remove a re-key, clarify ownership, publish one trusted view
4. **Decide what must become a system** — and what can stay a well-governed spreadsheet
5. **Only then shortlist software** — scored against your outcomes, with a proof on your real data

That sequence protects you from buying a heavy system to solve a light problem — and from clinging to a sheet that is already costing customers.

How to govern a spreadsheet you are keeping

If the honest answer is “keep it for now”, raise the bar:

- One owner, named
- One master location, not email attachments
- Clear rules for who may edit
- A simple log of what changed and why, for anything that affects stock, money or customers
- A backup you have actually restored once

A governed spreadsheet beats an ungoverned “system” every time.

Questions before you systemise

Ask these before anyone demos software:

- Which decisions fail when this sheet is wrong?
- What must be accurate by 9am every trading day?
- Who is the human source of truth today — and what happens if they leave?
- Are we buying software to encode a clear process, or to avoid designing one?
- Can we prove the new system on a thin slice of real work before a full cutover?

If you cannot answer those, you are not choosing a system yet. You are still discovering how the business works.

Where Two Wrens fits — if you want help

A Digital Business Health Check is often enough to see the friction and the sequence. A Process Automation Review fits when re-keying and hand-offs are the main drain. If core platforms are the issue, the systems guide is the next read.

Those are options, not the point. The point is to systemise for operational truth — not for the comfort of a software purchase.

Next step

Book a Discovery Call before anyone migrates a live system. Bring the sheet that worries you most. That is usually enough to see whether you need governance, automation, a new platform, or simply a clearer process.

Talk it through

If this guide is useful, a Discovery Call is the natural next step — no obligation, no sales script.

Book: twowrens.co.uk/contact

Email: hello@twowrens.co.uk