Forest Admin

Practical Guide

Are Spreadsheets holding back your Ops Team?

There is a better way to manage workflows, customer data, and team performance.

Editorial

The Spreadsheet Dilemma in Operations

Spreadsheets have been the backbone of operations teams for years. They offer a familiar and flexible way to manage data, track workflows, and collaborate on projects. When an operations manager faces a new challenge—whether it's handling customer requests, managing assets, or coordinating with an outsourced team—the first instinct is often to open a spreadsheet. **This approach works well in the early stages of projects, where agility and simplicity are key.**

However, **as companies scale and processes become more complex, spreadsheets start showing their limitations**. What was once a quick and easy solution turns into a cumbersome, error-prone system that drains time and creates operational risks. Teams find themselves constantly updating files, fixing broken formulas, and dealing with version conflicts. **The more critical the operations, the more fragile spreadsheets become**. In this guide, we explore the most common use cases for spreadsheets in operations, where they start to break down, and what a better alternative looks like.

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The Beginning

Spreadsheets are The First Tool Every Ops Manager Uses (Until...)

Every operations manager starts with spreadsheets. They are the go-to for any kind of ops initiative. And why make things complicated? Spreadsheets are easy to set up, require no special software or subscription, and allow teams to move quickly.

In the beginning, they are an effective way to manage lists, track processes, and organize tasks. But as the volume of data increases and processes become more intricate, spreadsheets turn into a source of inefficiency. What once felt like a simple, intuitive system becomes an endless cycle of manual updates, duplicated efforts, and frustrating workarounds.

Spreadsheets are not inherently bad. They work well for proof-of-concept operations and small-scale projects. The problem arises when companies continue to rely on them beyond their breaking point. Let's look at some of the key areas where operations teams rely on spreadsheets—and where those spreadsheets start to fail.

The Situations

Four examples where spreadsheets come in handy... up to a point

1. Managing Customer Requests, Cases, and Tickets

When companies first start handling customer inquiries, spreadsheets seem like a logical solution. A simple sheet with case numbers, descriptions, and assigned team members can keep track of requests. However, this approach quickly falls apart as case volumes rise.

There is no way to schedule or dispatch cases efficiently. Assignments must be updated manually, leading to missed or delayed responses. There is no structured approval workflow, making it difficult to escalate issues appropriately. Tracking who made changes or modified entries is nearly impossible, which leads to confusion and errors. Most importantly, spreadsheets provide no insight into how long cases take to resolve, making it impossible to track team performance and improve efficiency.

2. Managing Outsourced Teams Without Internal Tool Access

Operations managers working with outsourced teams often rely on spreadsheets to distribute customer lists and assign tasks. Since external teams may not have access to internal systems, spreadsheets become the bridge between organizations. But this approach has significant drawbacks. First, work is assigned in bulk rather than in real time, leading to inefficiencies.

There is no way to dynamically allocate tasks based on availability or skill level. Security and compliance risks are another major concern: spreadsheets are not designed for secure data sharing, and sensitive customer information can easily be mishandled. Integrating spreadsheets with internal systems is cumbersome, requiring constant manual updates. Finally, managers lack real-time visibility into how outsourced teams are performing, making it difficult to track progress or make informed decisions.

On the financial side, spreadsheets create additional challenges. Tracking volume, costs, and invoicing is difficult without a structured system. Since updates are manual, errors are common, leading to billing discrepancies and lost revenue.

3. Keeping Track of Assets, Properties, or Inventory

Many operations teams use spreadsheets to maintain records of company assets, whether it's a fleet of vehicles, a collection of rental properties, or an inventory of equipment. This system works well at first, but as the number of assets grows, it becomes unmanageable.

One major issue is the increasing complexity of tracking related data. A single spreadsheet may contain an asset list, but maintenance records, repair logs, and usage history often require separate tabs or even entirely separate files. Linking this information becomes a challenge, and keeping everything up to date is a manual, error-prone process.

There is no way to automate alerts for maintenance schedules, track usage in real time, or implement structured workflows for asset approvals or repairs. Financially, this creates further issues. Calculating real-time costs, margins, and revenue generated from assets requires manual data reconciliation, which is time-consuming and prone to mistakes.

4. Centralizing Customer Data from Multiple Sources

Many businesses rely on spreadsheets to consolidate customer data from different systems, such as CRMs, helpdesks, and payment platforms. By exporting data into a single spreadsheet, operations teams try to get a full picture of customer activity. But this approach introduces significant risks and inefficiencies.

One major challenge is data security. Not all customer information can or should be exported into a spreadsheet due to compliance and privacy concerns. Additionally, spreadsheets require manual reconciliation, often using complex formulas like VLOOKUPs to combine data from different sources. This is not only tedious but also highly error-prone.

Another issue is data freshness. Spreadsheets are static files, meaning they are outdated the moment they are exported. Any real-time insights require frequent manual updates, which are neither scalable nor reliable. On the financial side, revenue tracking becomes unreliable without real-time access to financial data, making forecasting and decision-making difficult.

Wondering if your team has reached the tipping point?

Take the test with our Spreadsheet Checklist in the Resources section.

The Turning Point

Why and how to quit spreadsheets for a real ops platform

The Hidden Costs of Relying on Spreadsheets in Ops

The inefficiencies of spreadsheets don't just slow down operations—they create real business risks. Teams spend hours manually updating data, fixing errors, and dealing with version conflicts. Critical information can be lost with a single accidental deletion. There is no way to track individual or team performance effectively. And as businesses scale, spreadsheets simply do not scale with them.

Perhaps the biggest hidden cost is financial inefficiency. Tracking revenue, costs, and margins accurately is nearly impossible with manual data management. This makes it difficult to make informed business decisions and optimize profitability.

Limitations of Spreadsheets

Spreadsheets become problematic as business grows:

- Versioning when multiple people work on the same file
- Error propagation from incorrect formulas or data entry
- Performance issues with large data volumes
- Limited automation capabilities for complex tasks
- Inadequate security features for sensitive data

→ Discover our full list in the Resources section

Moving from Spreadsheets to a Real Ops Platform

At some point, spreadsheets stop being a solution and start being a problem. When an operations team spends more time managing

spreadsheets than managing actual operations, it's time to transition to a structured platform.

A modern operations platform provides live, structured data instead of static spreadsheets. Workflows, automation, and audit logs are built in. Access controls ensure secure data sharing, even with outsourced teams. Financial tracking is integrated, allowing for real-time revenue and cost analysis. Custom dashboards provide visibility into performance, helping teams optimize efficiency and scale effectively.

How Ops Teams Are Replacing Spreadsheets with Internal Apps

Instead of manually managing processes in spreadsheets, leading operations teams are building flexible internal applications that adapt to their workflows without requiring a full IT team.

For example, Edumiam, a food delivery company, initially relied on spreadsheets to manage driver schedules and delivery assignments. As they grew, this system became unmanageable. They switched to Forest Admin, which allowed them to build a fully customized internal platform. This new system automated scheduling, streamlined data access, and provided real-time financial insights, all without requiring expensive development resources.

What made Edumiam look for a better solution?

Social startup Edumiam promotes equal opportunities through training for early-childhood professionals. In early stages, business operations were conducted using Excel. While well-built and efficient, their complex spreadsheets lacked essential features and raised security concerns. Edumiam switched to Forest Admin for its back office operations.

→ Read the full case study

The Conclusion

Spreadsheets Have Their Place, but Not at Scale

Spreadsheets are invaluable for early-stage operations and quick proofs of concept. But as teams grow, they become a bottleneck. Modern ops teams recognize when it's time to move from manual tracking to structured, automated solutions.

Ready to move beyond spreadsheets and take your operations to the next level? Let's talk.

The Spreadsheet Trap

20 Limitations Holding Your Business Back

Data Management Issues

1. **Scalability issues**: Performance degrades significantly as data volumes increase.
2. **Hard size limitations**: Most spreadsheet applications have maximum constraints on rows and columns.
3. **Limited data relationships**: Cannot effectively represent complex relationships between different data types that relational databases handle easily.
4. **Data integrity problems**: No built-in constraints to prevent users from entering inconsistent data or values that violate business rules.
5. **Limited data validation**: Basic validation exists but lacks the sophistication of database constraints.

Collaboration and Control Challenges

6. **Version control challenges**: Difficult to track the latest version when multiple people work on the same file, even with cloud solutions.
7. **Collaboration difficulties**: Even with cloud solutions, conflicts arise when multiple users work simultaneously.
8. **No true multi-user architecture**: Not designed from the ground up for enterprise multi-user environments.
9. **Poor auditability**: Limited ability to track who made changes, when changes were made, and why.
10. **Inadequate security features**: Lack robust protection for sensitive data.

Technical Limitations

11. **Error propagation**: A single misplaced decimal or incorrect formula can cascade errors throughout the entire spreadsheet.
12. **Absence of true database features**: Lack transaction processing, robust querying, and indexing that databases provide.

13. **System isolation**: Typically exist as islands of information, requiring manual processes to connect with other business systems.
14. **Inefficient for large calculations**: Performance issues with complex calculations across large datasets.
15. **Limited automation capabilities**: Complex, repetitive tasks require manual intervention, increasing error risk.

Maintenance and Usability Problems

16. **Growing maintenance burden**: As complexity increases with formulas and macros, spreadsheets become increasingly difficult to maintain.
17. **Difficult debugging**: Finding errors in complex formulas can be time-consuming and challenging.
18. **Challenging change management**: Difficult to implement structural changes without disrupting existing functionality.
19. **Inconsistent formatting**: Without strict controls, formatting and structure can vary widely across different sections.
20. **Restricted visualization options**: Basic charts are available, but advanced data visualization requires external tools.

Self-Diagnostic Checklist

Has Your Team Outgrown the Spreadsheet Phase?

Check all statements that apply to your organization:

Data Management

- ☐ Our spreadsheets often slow down or crash from too much data
- ☐ We're hitting row/column limits in our spreadsheets
- ☐ We struggle connecting different types of data meaningfully
- ☐ We frequently find inconsistencies in our data
- ☐ We need better data validation than spreadsheets provide

Collaboration & Control

- ☐ We waste time figuring out which file is the latest version
- ☐ Team members need to work on the same file at the same time
- ☐ We need better access controls than spreadsheets offer
- ☐ It's hard to track who made which changes and when
- ☐ Our sensitive data requires stronger security measures

Technical Capabilities

- ☐ Formula errors regularly affect our work
- ☐ We need database features like queries and indexing
- ☐ We manually move data between spreadsheets and other systems
- ☐ Large calculations slow everything down
- ☐ Too many manual tasks eat up our time

Maintenance & Usability

- ☐ Our spreadsheets are becoming maintenance nightmares
- ☐ We spend too much time fixing formula errors
- ☐ Changing our spreadsheet structure is risky and disruptive
- ☐ Inconsistent formatting makes our spreadsheets hard to read
- ☐ We need better visualization options than spreadsheets offer

Your diagnostic

0-4 checks: Spreadsheet Sweet Spot
Your team is using spreadsheets well. They fit your needs for now, but keep an eye on these areas as you grow.

5-9 checks: Spreadsheet Growing Pains
You're starting to feel some pain points. Look into specific tools to fix your biggest issues while keeping spreadsheets for what they do well.

10-14 checks: Spreadsheet Breaking Point
Spreadsheets are now holding your team back. Time to explore databases, BI tools, or specialized software for your main operations.

15-20 checks: Spreadsheet Overflow
You've definitely outgrown spreadsheets. These limitations are costing you efficiency, accuracy, and competitive edge. Start transitioning to better solutions now.

Next Steps

If you scored into the "Spreadsheet Growing Pains" category or higher:

1. Identify your biggest pain points from what you checked
2. Research solutions designed specifically for those problems
3. Test an alternative approach with a small pilot project
4. Create a transition plan that won't disrupt your ongoing work

Remember: The right tool depends on your specific needs. Options include relational databases, no-code platforms, dedicated business applications, or a combination of solutions working together.

Forest Admin

Built for intensive operations teams.

Empower your team to achieve better collaboration and improve the efficiency of your customer operations with our unique platform. Accelerate process handling, resolve support issues faster, close cases more efficiently and track team performance.

More than just a product, we are your operations partner. Leverage our market experience and benefit from our advisory services to address your challenges effectively.

Discover Forest Admin now