

YOUR PLAYBOOK

BEYOND EXCEL FOR RESOURCE PLANNING

The essential move to specialist
software for growth-led firms



Retain



What you will discover

For decades, Excel has been used for managing resources. Its versatility and ease of use made it a go-to tool in the early stages of many businesses. Yet, as these firms scaled and their operations became more intricate, the cracks in relying solely on Excel began to show.

This shift has been in the works for years.

Of the 78 million advanced spreadsheet users worldwide, data-native workers reported that they are losing 800 hours annually due to 61% of data activities still being completed in inefficient legacy spreadsheets.

Therefore, organisations need to shift from traditional tools like Excel spreadsheets and disconnected tools to specialist resource planning software.

In this guide, you'll learn:

- Why growth-led firms must move beyond Excel and adopt specialised software for resource management.
- The challenges businesses face with Excel.
- The benefits of making the switch to specialist software.



What's driving the need for specialist software?

Over the last 30 years at Retain, we've spoken to hundreds of people-based professional services firms. Through these conversations, we've heard the same trends come up again and again around the modern resource planning experience:



Trend 1: Scalability

As organisations expand, so does the scale of their projects and teams. Excel struggles to keep up with the dynamic allocation and reallocation of resources that large-scale projects require.



Trend 2: Collaboration

Growth often leads to larger teams and sometimes, teams distributed across various locations. Excel's lack of real-time data can hinder communication and slow down decision-making processes.



Trend 3: Visibility

When organisations grow, maintaining an overview of all ongoing projects and their resource allocation becomes crucial. Excel's static nature makes it difficult to get a real-time view of resource utilisation and project progress all in one place.



Trend 4: Security

As the volume of data increases, so does the risk of errors in data entry and analysis. Excel, reliant on manual updates, is prone to errors, which can lead to costly mistakes and inefficiencies. There's also the risk of version control, access rights, and data security.

These challenges continue after resources are scheduled when teams rely on emails and meetings to share back-and-forth information related to project milestones, client budgets, and more.



Why is resource planning so hard in Excel?

Organisations have tried to force a square peg into a round hole for years by using tools like Excel to manage resource planning. This pain was described in a recent [ERP Today](#) article. David Lees, writes; “businesses are still trying to operate and manage their systems like it’s 1985.”

David adds; “a reliance on outdated manual tools and processes is having a direct impact on enterprises’ ability to achieve their growth objectives,”

Excel isn't built for resource planning

As organisations scale, it’s harder to share information and stay on the same page across teams.

- **It’s hard to see project statuses.** Companies rely on ad hoc updates.
- **It’s hard to allocate resources.** Without a central database, it’s hard to match talent to projects.
- **It’s hard to share information.** When employees leave, companies are left trying to figure out the status of a customer relationship.
- **It’s hard to forecast.** When it comes time for a forecast review, project managers bother busy talent teams to provide updates and update absence and leave information.

Everything becomes “tribal knowledge”—trapped in drive folders, internal tools, and email inboxes. Top performers know how to get things done, but there aren’t any tools to help cross-functional teams collaborate effectively at scale.

The bottom line: Sticking with Excel for resource planning means you’ll be stuck trying to make your best guess based on what’s in front of you. It’s not sustainable. In the long term, this is going to hinder growth opportunities and make strategic goals much harder.



Has your organisation outgrown Excel for resource planning?

For most people involved in resource planning, the need to move from spreadsheets to specialist software doesn't need to be spelt out. They are written clearly enough in the everyday experiences of inefficiencies, limitations, and the errors and costs of manual processes.

If you downloaded this ebook, you probably have a feeling tools like Excel aren't meeting your needs.

On the next page there are some questions to consider to help you make a choice.

As you'll probably see, the software organisations use to manage resource planning hasn't kept pace with resource management needs.

Continuing to manage complex resource management requirements over spreadsheets and email is out of the question. Things get lost in long threads with too many links and attachments. It's confusing for everyone.







HERE'S WHAT YOU CAN DO DIFFERENTLY:

Moving to specialist software

Moving to a resource planning solution, like Retain, sounds like it might be complex and expensive. But it really doesn't have to. Take pricing. There are solutions with all different price points which offer the flexibility to grow with your team.

Now don't get us wrong. Some major ERP solutions are expensive. However, more specialist resource management platforms offer more innovative features—and keep their price reasonable.

Likewise, specialist tools needn't be complex either. For example, Retain offers different dashboard views. So you can view resources in a very similar way to Excel, or you can use a dynamic calendar view.

Take it from Adam Passmore, at RSM Cayman (RSM); "Retain has empowered RSM Cayman to scale our resource planning to match our rapid growth, providing a more streamlined, efficient, and productive approach to our resource management needs."

The initial set-up took 7 days. RMS loved how the transition was "remarkably straightforward, as the previous allocation process was highly manual". But, for RSM, the most notable change was the ability to access live data. This change saved the team up to 64 hours of admin time a month.

In a similar way, Pitcher Partners found moving to resource planning software very easy too; "It's user-friendly, very flexible, and customisable to your own liking", says Selmi van Staden, Director of Audit Ops at Pitcher Partners.

"The onboarding and set-up were quick, with only half a day needed to configure and get the data format right. The customer support team are also very friendly and responsive which is amazing given the time difference."

Needless to say, resource planning isn't the right use case for Google Sheets or Microsoft Excel. Moving to dedicated resource planning software makes a lot more sense, especially if your organisation is growing.

If you're thinking, "OK I get it. Show me what a resource management system is and how it can help" this next section is for you.



What is a specialist resource management system?

Specialist resource management software, like Retain, gives your resource and project managers the information they need to precisely plan, allocate, and forecast resources. Real-time resource tracking gives you the ability to adapt to changes swiftly, reducing the risks associated with shifting deadlines or unexpected absences.

But it's not just about the here and now; powerful analytics tools offer valuable insights, helping you make informed and accurate decisions for the future.

Resource planning tools, like Retain, are built with the challenges of resource management in mind. They offer features that will save you time on resource management tasks while surfacing the data and insights that you need to see.

Retain's real-time view helps you see who is available, and provides precise information on skills, availability, location, and more.

While accuracy is certainly a benefit of using a specialist tool, it's not the only one;

- **Use AI-powered rapid resource planning:** Search for unassigned resources quickly, pinpoint specific skills, or view resource availability.
- **Achieve smart resource matching:** Match people with projects based on comprehensive insight into skills, certifications, experience, and availability.
- **Track time & billable hours:** Resources can log their time against projects, and the system calculates billable hours for clients.
- **Model different scenarios to stress-test your plan:** Improve resource forecasting and run what-if scenarios to see how changes in project timelines, resource availability, and budget impact your overall resource plan.
- **See real-time insight to make corrections sooner:** Compare real-time forecasting to your resource plan to identify gaps and quickly make adjustments.
- **Plan in one place with access controls:** Get a calendar view of resource allocations across all projects to optimise planning. Customise access controls for multi-user access.
- **See the expected ROI of every project:** Link each project to strategic goals and quantify the expected business impact.
- **Track utilisation and budget in one place:** Monitor project budgets, actuals, and resource time in the same system.
- **Do more with data:** Bring together disparate systems, including CRM and HR systems, to gain a single, comprehensive view of your business and its people.



Improve resource planning with the right technology

Moving from Excel to specialist technology can feel daunting. But using spreadsheets for resource planning is just making things harder for yourself. It's a classic case of not picking the right tool for the job.

The good news: with the right platform, it doesn't feel like a complete upheaval—instead, you'll love using the tech while delivering your very best work.

Side note: The timeline to get fully operational doesn't have to be long-winded. Accountancy Firm, [Fruitman Kates](#) were up and running within 3-weeks of sign-off.

With a [tool like Retain](#), you can spend less time fixing off-target resource plans and more time adding strategic value.

If you're pro-change, but facing resistance from colleagues, it can be frustrating. If you want to read more about building a business case for resource planning software, we have a [handy guide](#). ([plus, we also have a template you can use here](#).)

Revolutionise your resource planning: [Get in touch](#) for a personalised demo today.



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Start resource management precision with Retain

When your resource planning process is tired, you're essentially leaking profits from your resource management. But with Retain, you achieve resource management precision—all done through having real-time visibility into your resources, skill-sets, utilisation, and forecasting.

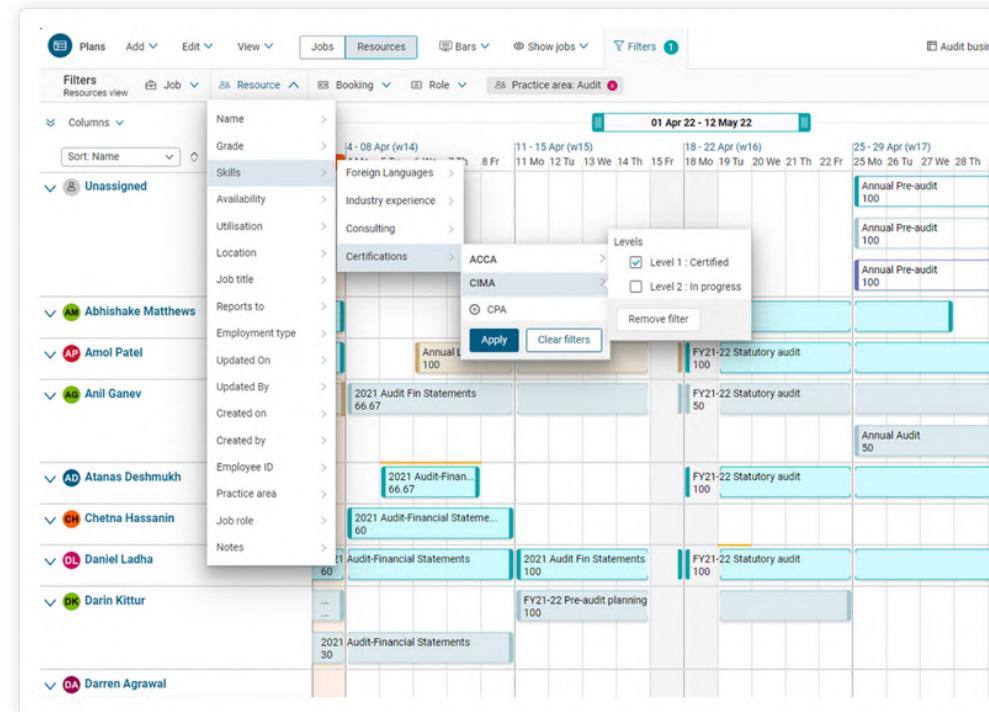
Take your resource planning to a whole new level for outstanding results.

Retain, a leader in resource management software, sets a new standard for resource management, pushing boundaries with over 20 years of expertise backed by leading-edge technology.

Find out how Retain can change the way you do resource planning, and stop leaving profit on the table.

Click to start your journey. 🖱️

[Request your demo now](#)

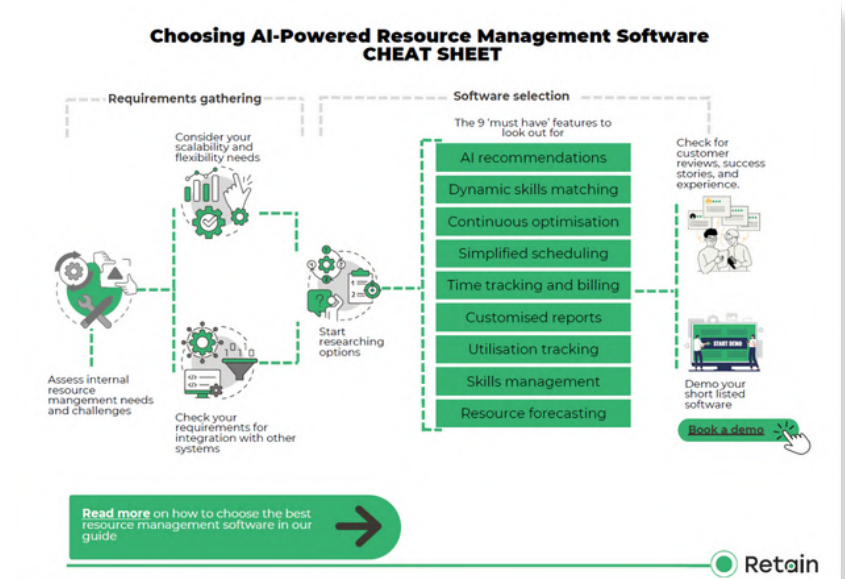


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More resources

For more resources on how to improve resource management, you can:

- [Download our cheat sheet](#) on how to choose resource management software
- [Read our mini guide](#) on the pros and cons of AI in resource management
- [Download our template](#) to build a business case for resource management software
- Get insights from Retain via our [monthly LinkedIn newsletter](#)
- [Follow Retain on LinkedIn](#).



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NEXT STEPS

Explore how Retain can help you to effectively allocate resources, cost management, and financial projections.



To learn more visit:

<https://www.retaininternational.com>

If you're ready for that next step, you can
book a demo here.