

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.



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DOWNLOAD THE PLAYBOOK

Read the full playbook on moving beyond excel to discover how to effectively allocate resources, cost management, and projections.



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