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Outgrowing Spreadsheets Checklist

Use this checklist to assess whether spreadsheets are still a suitable way to manage your assets and information. Identify limitations, risks, and signs that a more structured system may be needed.

Scoring

Yes = 2 points
Partially = 1 point
No = 0 points
Add up your score at the end to see your result.

1. Visibility & Access

Can you quickly find the information you need without searching through multiple spreadsheets?

☐ Yes ☐ Partially ☐ No

Is all asset or record data stored in a single, central location?

☐ Yes ☐ Partially ☐ No

Can multiple people access and update information without confusion or duplication?

☐ Yes ☐ Partially ☐ No

Do you have a clear, real-time view of your assets or records?

☐ Yes ☐ Partially ☐ No

2. Accuracy & Control

Are you confident that your data is always accurate and up to date?

☐ Yes ☐ Partially ☐ No

Are changes tracked so you can see what was updated and by whom?

☐ Yes ☐ Partially ☐ No

Is there a clear structure or standard for how data is entered and maintained?

☐ Yes ☐ Partially ☐ No

Do you avoid duplicate, missing, or inconsistent data?

☐ Yes ☐ Partially ☐ No

3. Tracking & Accountability

Can you track asset location, movement, or status easily?

☐ Yes ☐ Partially ☐ No

Is ownership or responsibility clearly assigned and visible?

☐ Yes ☐ Partially ☐ No

Can you see a history of changes or updates when needed?

☐ Yes ☐ Partially ☐ No

Are responsibilities clearly understood across your team?

☐ Yes ☐ Partially ☐ No

4. Efficiency & Scalability

Does your current setup work efficiently as your organisation grows?

☐ Yes ☐ Partially ☐ No

Are manual updates or workarounds kept to a minimum?

☐ Yes ☐ Partially ☐ No

Can your system handle increasing volume or complexity without issues?

☐ Yes ☐ Partially ☐ No

Is managing spreadsheets quick and straightforward, not time-consuming?

☐ Yes ☐ Partially ☐ No

5. Risk & Limitations

Do you have control over who can access, edit, or delete information?

☐ Yes ☐ Partially ☐ No

Are you confident your current setup supports compliance requirements?

☐ Yes ☐ Partially ☐ No

Can you quickly respond to requests for information (e.g. audits)?

☐ Yes ☐ Partially ☐ No

Do you feel your current approach is sustainable long-term?

☐ Yes ☐ Partially ☐ No

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Your Score

Yes = 2 points / Partially = 1 point / No = 0 points
Total possible score: 40
Add up your points:

What your score means

30–40

Still Fit for Purpose

Spreadsheets are currently working for your needs, with manageable complexity.

Focus next on:

- Maintaining structure and consistency
- Planning for future growth
- Avoiding unnecessary complexity

18–29

Starting to Strain

There are clear signs that spreadsheets are becoming inefficient or difficult to manage.

Focus next on:

- Reducing manual effort
- Improving visibility and control
- Exploring more structured solutions

0–17

Outgrown Spreadsheets

Spreadsheets are likely limiting visibility, control, and scalability.

Focus next on:

- Moving to a centralised system
- Improving tracking and accountability
- Reducing risk and inefficiencies

Final Insight

Many organisations continue using spreadsheets longer than they should. As complexity grows, the time lost, risk, and lack of control often increase significantly.