

ARE SPREADSHEETS STILL RUNNING PARTS OF YOUR BUSINESS?

Are some of your team still sneakily using spreadsheets?

It can happen, even after implementation of such a comprehensive system as Synergist.

Why? Many people have used spreadsheets for years, and it can become something of a habit. And not everyone is aware

of the problems that can result by persisting with them.

THE VISION

The MD of a company said this to us recently after implementing Synergist:

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“ We’ve dumped so many spreadsheets! On the consultancy side we had one for each job, and several for sales planning, and one for tracking forward actions, and one for costings, and then there were the spreadsheets for monthly reporting and financial analysis. And then those on the training side too. In total

I bet we’ve abandoned over twenty spreadsheets.”

Rebecca Frain

That’s a reminder of what a comprehensive system is about:

Pulling everything **together into one place.**

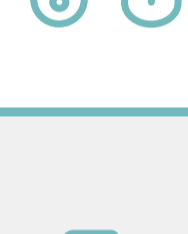
THE ISSUES

Synergist is your organisation’s core system that holds data everyone needs. It tracks...

- Clients and contacts in a central database
- New Business contacts, providing CRM functionality
- Business opportunities and forecasts
- Jobs and projects
- Estimates and quotes
- Purchase orders
- Sales invoicing
- Billing
- Gross profit forecasting
- Capacity forecasting and scheduling
- POs raised
- WIP

Are any of these areas still being managed via spreadsheets in your company?

THE PROBLEMS WITH SPREADSHEETS



DATA MAINTENANCE

Problems arising due to multiple authors and poor auditing, resulting in invisible errors.



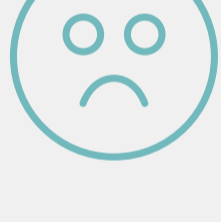
NOT REAL TIME

Multiple spreadsheets cannot provide live information because the data is so scattered and some of the information quickly becomes out of date.



FRUSTRATION AND LOST TIME

Wasted time is not merely lost productivity. All that spent energy takes a heavy toll in other ways too...



LOW MORALE

Your team members didn’t join your company in order to spend their time hunting for information, re-entering data, reconciling data discrepancies or wrestling with spreadsheet formula errors.



DIMINISHED CLIENT SERVICE

All that wasted time gets in the way of being able to deliver good client service.



MULTI-USER ISSUES

Most spreadsheet users across the world use Excel. However Excel was not designed for collaborative work. The only solution is to have one single central source of all the data, removing the need for the vast majority of spreadsheets.



NO SCALABILITY

A system’s scalability is its ability to function well even when the number of users and the amount of data handled grows and grows. Systems that aren’t scalable trigger a disruptive system break at a time not chosen by management when everyone’s focus is on the challenging job of managing growth and business change. Could there be a worse time to distract the steering of the ship? How many people is too many for a spreadsheet-based company to function well? Synergist can be used by 15 to 500 people.



INFLEXIBILITY

Each spreadsheet you create is designed to focus on one area or deliver one sort of result. What happens when a different focus is needed later for another type of analysis sharing some common elements with the first? Create another Spreadsheet? Amend the first one and lose the initial focus?



SEEING THE BIG PICTURE

If the spreadsheet didn’t exist, what would project-based businesses run their companies on? The answer: Systems designed for exactly that purpose. Multi-user, real-time, scalable central systems, like Synergist.

NEXT STEP

If you’ve got lingering spreadsheet issues, just talk to your client services representative at

The Agency Works to discuss the best solution, which might involve things like a system audit,

additional training or fine-tuned reports.



THE AGENCY WORKS

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synergist
IMPLEMENTATION PARTNER