

LEARN / APPLY / REFLECT

Beyond Spreadsheets: Choosing the Right Business Systems

A free course for growing organisations comparing business software. Turn spreadsheet frustrations into requirements, evaluate vendors and plan a manageable transition.

Your practical learning workbook

Follow the estimated study times shown for each lesson. Course totals include the external videos, notes, activities, a 10-minute understanding check and a 20-30-minute practical assignment. Reading the optional presenter scripts may take extra time.

Use fictional or non-confidential examples. Write on a printed copy or keep your answers in your own document. Online lesson pages also let you save activity notes on your current browser.

Your name: _____

Start date: _____

By the end, you can

- Recognise when shared systems may be more suitable than spreadsheets.
- Create a requirements-led shortlist and demonstration script.
- Compare total cost and implementation readiness before selecting a system.

Learning route

1. Recognising the trigger for change
2. Requirements that describe the work
3. The selection team
4. Demonstrations with evidence
5. Fit, risk and total cost
6. A controlled transition

Complete the online understanding check and use the final assignment rubric to review practical application. This workbook is introductory learning, not a professional qualification.

LESSON 01 / PRACTICE

Recognising the trigger for change

Separate a genuine system need from a desire for new software.

Spreadsheets remain useful for analysis and small controlled tasks. The trigger for a new system is a recurring business limitation that process discipline cannot reasonably solve. Quantify rework, delayed decisions and control failures where possible. Consider simpler improvements first, then define the scope of a system evaluation around the remaining problem.

Workplace example

A finance team merges six spreadsheets every month and repeatedly corrects inconsistent customer codes. The decision begins with the cost and control impact of that work.

Your activity

List three spreadsheet problems. For each, describe the business impact and an alternative process improvement.

Self-check

Which is the strongest reason to evaluate a shared business system?

- A. A competitor bought one
- B. Repeated data conflicts and control gaps affect operations
- C. A vendor offers a colourful dashboard

LESSON 02 / PRACTICE

Requirements that describe the work

Write requirements in terms of outcomes and constraints.

Write a requirement that a vendor can demonstrate and a user can accept. Include the actor, event, rule and expected evidence. Distinguish business necessity from a preferred way of implementing it. Include exceptions, permissions and integration needs. Keep a reference number and owner so the requirement can be traced through demonstration, scope and testing.

Workplace example

Instead of requiring a particular screen layout, a buyer asks for approval by value, traceable changes and a clear urgent-order exception.

Your activity

Write five requirements. Mark which ones are essential and explain why.

Self-check

Which requirement is most useful for evaluation?

- A. The software should look modern
- B. It must support value-based approvals with an audit trail
- C. It should have the most modules

LESSON 03 / PRACTICE

The selection team

Include the people who understand operations and implementation constraints.

Define who recommends, who decides and who can veto a failed mandatory requirement. Ask users to bring concrete scenarios rather than personal feature wish lists. Finance evaluates cost assumptions, IT checks integration and security, and process owners assess practical fit. Resolve conflicts before vendor scores are combined, and retain a written decision record.

Workplace example

Finance favours reporting depth while operations needs reliable stock transactions. A cross-functional team agrees priorities before comparing vendors.

Your activity

Identify the people who should evaluate your next system and the decisions each person can make.

Self-check

Who should participate in selecting a cross-functional system?

- A. Only the vendor's sales team
- B. Only the most senior executive
- C. Relevant business users, decision-makers and technical representatives

LESSON 04 / PRACTICE

Demonstrations with evidence

Evaluate vendors using comparable business scenarios.

Ask vendors to show a transaction end to end using the same sample data. Record whether each capability is demonstrated, configured, custom, third-party or unproven. A roadmap promise is not a delivered capability. Compare evidence using agreed criteria, and follow up unresolved gaps in writing before treating them as included scope.

Workplace example

Two vendors demonstrate the same order-to-cash scenario, including a partial delivery and a credit note. Evaluators score the evidence independently before discussion.

Your activity

Prepare a demonstration script with one normal transaction and one exception.

Self-check

What makes vendor demonstrations easier to compare?

- A. Letting each vendor choose unrelated examples
- B. Using the same business scenarios and scoring criteria
- C. Scoring only the presentation style

LESSON 05 / PRACTICE

Fit, risk and total cost

Compare the complete commitment rather than the licence price alone.

Use the same term, users, entities and transaction assumptions for every proposal. Separate one-off and recurring costs, and show uncertainty for custom work. Check who owns maintenance, upgrades, data export and exit support. An aggregate score must not hide failure of a mandatory control. Clarify exclusions before comparing headline totals.

Workplace example

One proposal has lower licence fees but requires extensive custom work. The team compares several years of operating costs and the responsibility for maintaining changes.

Your activity

Build a comparison with cost, fit, delivery risk and exit considerations.

Self-check

Which proposal comparison is most useful?

- A. Lowest licence price only
- B. Total cost, functional fit, delivery risk and support obligations
- C. Largest discount from a vendor's list price

LESSON 06 / PRACTICE

A controlled transition

Plan how people and data will move to the chosen system.

Treat go-live as an evidence-based business decision. Define acceptance criteria, unresolved-issue severity, migration reconciliation and a cutover owner. Specify when to pause or roll back and how to reconcile transactions created during transition. Arrange named support and a review after launch. A pilot reduces uncertainty, but later branches still need readiness checks.

Workplace example

A company pilots one branch, validates opening balances and checks real transactions before expanding. Named support owners handle early issues.

Your activity

Draft a go-live checklist with data, users, testing, support and a decision owner.

Self-check

What should be agreed before go-live?

- A. Only the launch announcement
- B. Data validation, user readiness, cutover and support arrangements
- C. A promise to fix every issue after launch

FINAL ASSIGNMENT / 20-30 MINUTES

Your system-selection brief

A growing company has conflicting stock spreadsheets. Vendor A has a lower subscription but proposes custom work. Vendor B includes more standard functionality and a higher recurring fee.

Prepare a one-page response addressing these five points.

1. Define the business problem and mandatory requirements.

2. Name the evaluators and decision authority.

3. Create one common demo scenario including an exception.

4. Compare fit evidence, full costs, exclusions and delivery risks.

5. Set go-live, fallback, support and exit conditions.

Self-review rubric

For each point: 0 = missing; 1 = a relevant idea but vague or incomplete; 2 = a specific, feasible response linked to this scenario, with evidence or ownership where appropriate. Maximum 10. This is your self-rating, not an independent grade.

8-10: refine with your team. 5-7: strengthen weak areas. 0-4: revisit the relevant lessons. Any critical omission still needs attention regardless of the total.

WORKED RESPONSES / READ AFTER TRYING

Compare your reasoning

These are illustrative answers, not the only acceptable responses. Adapt them to your own context.

1. Recognising the trigger for change

Three problems: duplicate customer codes delay consolidation; conflicting price lists create corrections; emailed approvals lack a clear status. First standardise codes, define one price owner and clarify approval rules. Evaluate a shared system if coordination and traceability still cannot meet the business need.

Knowledge check: B. A business impact provides a stronger basis for investment than fashion or presentation.

2. Requirements that describe the work

REQ-01: when a purchase request exceeds the agreed threshold, route it to an authorised approver and retain the decision history. Acceptance: an unauthorised user cannot approve; approval and rejection are recorded; an approved deputy can act under the agreed policy.

Knowledge check: B. A specific, testable requirement helps vendors demonstrate the needed capability.

3. The selection team

Sponsor: approves investment and resolves priorities. Operations owner: validates stock and fulfilment scenarios. Finance: checks controls and cost. IT: assesses integration, access and support. Users: run task demonstrations. The team records mandatory gaps and recommends an option with conditions.

Knowledge check: C. A cross-functional team helps evaluate the system against real work and constraints.

4. Demonstrations with evidence

Scenario: receive a sales order for ten units, deliver six, invoice the delivered quantity and handle a return. Test role permissions and trace the documents. Score only what was shown; list any work promised for later as an unresolved gap with an owner.

Knowledge check: B. Common scenarios make functional differences and gaps more visible.

5. Fit, risk and total cost

Illustrative three-year comparison: setup RM20,000 plus subscription RM1,000 per month plus support RM500 per month totals RM74,000 before tax and other costs. Add migration, internal time, integrations, upgrades and contingency where relevant. These are exercise figures, not market prices.

Knowledge check: B. The full commitment includes implementation and operating risks as well as software fees.

6. A controlled transition

Go-live evidence: sample end-to-end tests accepted, opening balances reconciled, role access confirmed, users practised, support contacts available and cutover steps rehearsed. The sponsor signs the decision after reviewing open issues. A fallback trigger and reconciliation owner are recorded before switching.

Knowledge check: B. A controlled transition needs verified data, prepared users and clear operational arrangements.

FINAL ASSIGNMENT / WORKED EXAMPLE

Your system-selection brief

Ask both vendors to demonstrate stock receipt, partial dispatch and return using the same data. Mark each mandatory requirement as demonstrated, unresolved or dependent on additional work. Compare costs over the same term, including custom maintenance and migration. Request written scope and acceptance criteria; do not award on subscription price alone.

Your next 30 days

Choose one action, its owner, its due date and the evidence you will review.

Continue your learning

<https://sarah-ching-academy.ferching.chatgpt.site/learn/beyond-spreadsheets.html>

Original Academy teaching notes, exercises and illustrative scenarios. External videos are credited on the online course pages. Presenter scripts are drafts; talking-presenter videos are not included in this workbook.