



Ebook

We Love Excel *(But Not for Planning)*

 **DECISION LENS**

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INTRODUCTION:

The Times Demand a New Era of Planning

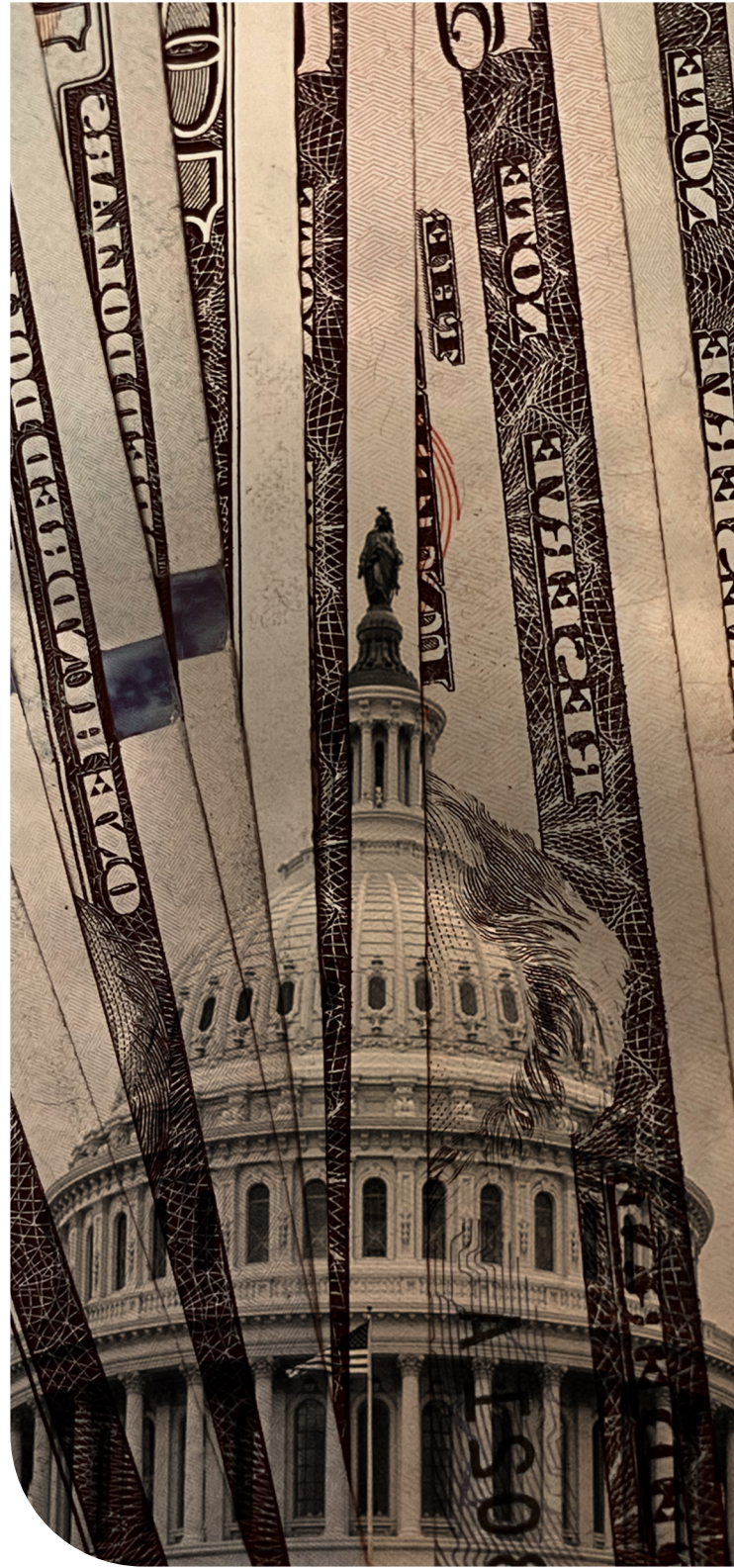
In the public sector, the need for agile, data-driven decision-making has never been more urgent. But many agencies still find themselves anchored to familiar tools like Excel and PowerPoint because they are unaware of software that is built just for them and specifically for integrated planning.

We understand and agree – Excel has its charms, and PowerPoint has its place. But they are not designed for the government’s movement towards a more agile, data-driven, transparent, empowered operation. Relying on the wrong tools is why analysts work nights and weekends pulling reports, leaders can’t rely on up-to-date data when making decisions, and government spending isn’t optimally aligned to the mission.

Consider this quote from the Department of Defense’s Software Modernization Strategy: “. . . the Department cannot rely on antiquated platforms and processes of the past . . . the vision for software modernization is simple - deliver resilient software capability at the speed of relevance.” This isn’t just an isolated call for change; it represents a collective recognition for the need to modernize.

It’s important to recognize that modernization transcends technology. It’s a pledge for better governance by turning the page from outdated practices to a future where decisions are data-informed, transparency is inherent, and accountability is foundational.

This eBook is a blueprint for transformation. It’s about why moving to integrated planning tools isn’t just beneficial, it’s crucial. We’ll dive into the shortcomings of traditional methods, show how commercial software paves the way forward, and illustrate why this isn’t merely a technological leap but a stride toward fulfilling the public sector’s true potential.



The Pitfalls of Conventional Tools

For financial managers, comptrollers, and planners within the public sector, Excel and PowerPoint have been the longstanding tools of choice for planning, budgeting, and reporting. However, as the complexity and scale of decision-making grows, the cracks in relying solely on these tools have become increasingly evident.

The result is short inefficient processes, a beleaguered workforce, and sub-par decision-making.

The Basic Issues

- **Manual Process Inefficiencies Drain Resources:** The extensive manual data entry and manipulation required by Excel and PowerPoint consume valuable time and resources that would be better spent on analysis and strategic initiatives.
- **Hard-to-Find Errors Result in Unreliable Data:** Excel's susceptibility to human error can lead to inaccurate data, which results in an inaccurate foundation for decision-making.
- **Data Integrity and Security Issues Expose Sensitive Information:** Weaknesses in traditional data protection tools increase the risk of breaches, threatening the integrity and confidentiality of crucial information.
- **A Single Point of Failure Due to Individual Ownership Risks Data Continuity:** Relying on single individuals for spreadsheet management creates a significant risk for data continuity and institutional knowledge retention.
- **Reliance on Old Data Leads to Subpar Decisions:** Decisions based on outdated information may not accurately reflect current needs or opportunities, diminishing the effectiveness of planning and allocation.

No Ability to Scale to the Enterprise

While the basic issues of Excel and PowerPoint are well known, the more pressing issues are evident as agencies look to scale and improve decision-making across the entire enterprise.

- **No Unified Decision Framework Leads to Strategic Misalignments:** The absence of a cohesive decision-making framework results in disconnected efforts and strategic misalignments, preventing effective resource allocation across an agency.
- **Collaboration Challenges Slow the Decision-Making Processes:** The lack of real-time collaboration capabilities in traditional tools introduces inefficiencies and slows down the consensus-building process.
- **Inflexible Reporting Limits Insightful Decision-Making:** The static nature of Excel and PowerPoint reports makes it difficult to adapt to new questions or analysis perspectives on the fly, limiting the depth of insights that can be drawn.
- **Nor Built on Decision Science.** Excel and PowerPoint can display potential decisions through charts and graphs, but those decisions still rely almost exclusively on the gut feel of individuals and not insight based on decision science.

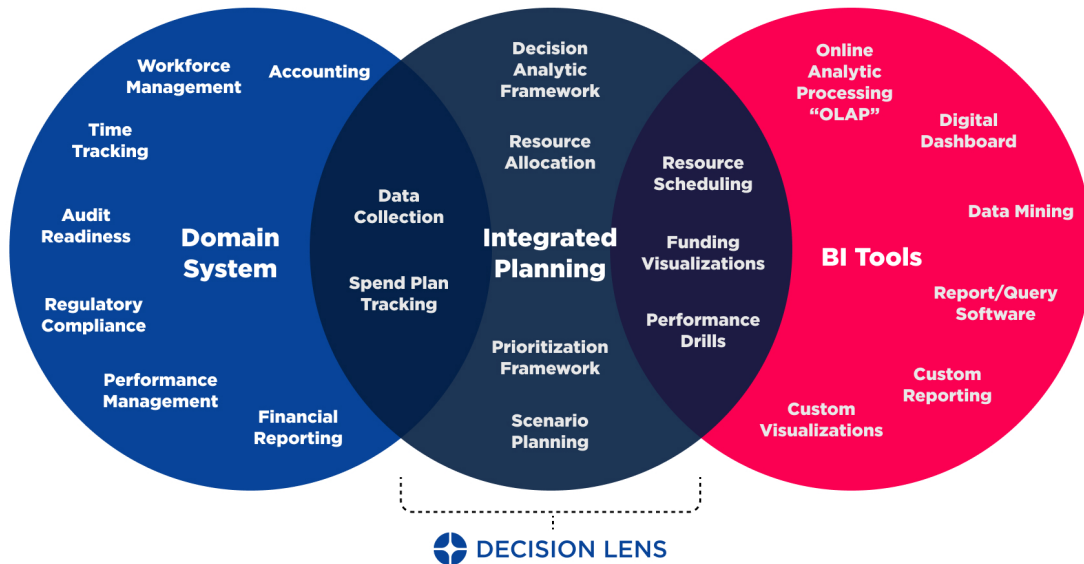
As government turns its focus to a more agile operation steeped in data-driven decision-making, it is essential for departments, divisions, and agencies to have a unified enterprise view of their portfolios.

As we delve deeper into the eBook, we will contrast these challenges with the capabilities of modern planning software, demonstrating how these tools are not just improvements but necessities for the public sector's future.

Embracing Modern Planning Solutions

It's understandable that integrated planning as a discipline is still conducted on spreadsheets and in boardrooms. There are great domain systems for accounting and financial data and an excellent array of business intelligence (BI) tools to visualize data. Decision-making and integrated planning tools – such as Decision Lens – can more effectively bridge these two systems and should not be overlooked.

Our Place in the Ecosystem



We are among the first SaaS companies to focus almost exclusively on government

Developed on data science, a proper integrated planning solution provides the essential capabilities for prioritizing, planning, and funding. Below are some of the benefits afforded to agencies that have modernized their approach to planning.

ONE Improved Data Security

Securing data is paramount. There are two ways that new tools enhance data security.

- 1. Direct Connect to Systems of Record.** The first is direct connection to systems of record – this isn't always possible due to government regulation – but an API call to connect systems is the most secure solution.
- 2. Better Import / Export.** Exporting information always creates risks, but modern tools minimize them. In this scenario, data is exported from a single service to a single secure machine and uploaded to another secure service. This scenario eliminates the risk of sending it via email and having dozens of spreadsheets floating around. Data access is then further secured through roles and rights granted to individual users in the software, which prevents individuals from accessing data they otherwise wouldn't have access to.
- 3. New System of Record.** Many Decision Lens customers use the software as a system of record for pre-decisional data. Data requests are sent through the system, data is ingested directly, and decisions are made all within a single secure environment. This environment can also connect directly with other downstream systems.

TWO Automated, Continuous Intake Provides Needed Insight.

Project calls made today are rife with inefficiencies. Input comes from many directions, in various formats, and is quickly out of date. The result is hours spent collecting, correcting, and transforming data instead of doing data analysis. An automated system based on an enterprise's decision framework allows an organization to ensure required data is collected and extraneous information is not. It turns an episodic process into a continuous process while eliminating time consuming data validation and accelerating decision-making.

THREE Built-in Collaboration and Transparency

With features designed for collaboration, modern planning tools bring teams together, breaking down silos and fostering a culture of transparency. Input projects can be reviewed, commented on, and analyzed by multiple individuals. This feedback is recorded forever to present insight into why decisions were made, providing necessary context and long-term defensibility. The ultimate goal, however, is to use that information to make better, faster decisions.

FOUR Strategic Decision-Making Support

Beyond prioritization, modern solutions integrate planning insights downstream. For example, planners looking at multiple years can assess priorities and begin developing a long-term plan. Financial leaders looking to the next year can begin applying dollars to investments and conduct scenario planning to ensure every dollar is spent in line with the mission. Finally, during the execution year budgeteers can track and monitor spend and re-allocate as needed to ensure no money is wasted. At every level, an integrated system provides support for strategic decision-making.

FIVE Agile reporting

One important component of improved decision-making is bringing actionable data into decision-making scenarios. Excel, PowerPoint and other current systems present a snapshot in time and frequently require hours, days or weeks to reconfigure for additional analysis. Modern solutions, however, are designed for 'in-the-room' decision-making. Want to change priorities? You can do that. Need to understand the impact of a budget cut? Not a problem. Mission aligned decisions are guaranteed to be made with modern solutions.

While this section has focused on technology, transformation requires more than a license to a new SaaS tool – it demands a new organizational mindset. This transition is not without risk. There are initial investments to be made, training to be completed, and cultural resistance to overcome. However, SaaS solutions are all designed to minimize these hurdles by offering online learning resources, reasonable pricing achieved by economies of scale, and providing better work outcomes for employees. Ultimately, the long-term benefits suggest it is critical to overcome initial reluctance and modernize.

In embracing these modern solutions, financial managers, comptrollers, and planners are not just upgrading their software; they are empowering themselves to lead their organizations with greater efficiency, insight, and strategic foresight.

Change Won't Happen Without You

As we've explored throughout this eBook, the transition from traditional tools like Excel and PowerPoint to modern planning solutions is not merely a technological upgrade but a strategic imperative for the public sector and employees looking to usher in the change necessary to make better, faster, mission-aligned decisions.

This journey, though challenging, is essential for navigating the complexities of today's financial management and planning landscape and to ensuring the long-term success and resilience of public sector organizations. Below are several ways you can help bring about change in your organization.

Overcome Barriers to Adoption

Recognizing the challenges of adopting new technologies—from budget constraints to resistance to change—is the first step toward overcoming them. The response most change agents get is either apathy or enmity. Understanding the reasons why people respond to modernization is useful in convincing them change can be a motivational change – not a scary one. Other factors will include understanding the cost of new software, evaluating what's available, and assessing inefficiencies within your department. Arming yourself with this information will make building the business case within your department for modernization easier.

Highlight the Benefits of a Data-Driven Future

In the era of big data, you need the ability to harness actionable insights to make better, faster, more mission-aligned decisions. Every agency understands this and recognizes the need to change. Start by understanding the strategy and guidance of your leadership through published articles. Use this information to highlight how today's inefficiencies are making the desired future state difficult or impossible to achieve. According to the Diffusion of Innovation, less than 3% of all employees are innovators. If you see a need, it's incumbent on you to advocate for a data-driven approach which aligns strategic decision-making with investment.



Collaborate to Gain Buy-In

The siloed nature of traditional planning tools hinders the potential for cross-functional collaboration and alignment, effectively limiting the wisdom of the organization. You probably feel this on a regular basis as data passes through your department without the broader context necessary to really understand its importance. Others feel it too. By working cross-functionally to identify these challenges, you can create the buy-in necessary to improve the situation. Focus on how modern software fosters a collaborative environment where financial managers, comptrollers, and planners can work together seamlessly. This unity is vital for building support for transformation and ultimately achieving strategic goals and responding agilely to changing circumstances.

Focus on Security and Compliance

With cyber threats on the rise and regulatory requirements evolving, security and compliance should always be on your mind. Spreadsheets are inherently insecure, and PowerPoint has never been known for its focus on security. Modern planning tools – especially those developed for the public sector – must adhere to extremely strict security protocols. Cloud solutions are backed by security teams at the world's largest cloud providers. Modern software does what is necessary to safeguard sensitive data and maintain public trust. This improvement alone should be sufficient to gain support and buy-in from others in IT and your leadership team.

For financial managers, comptrollers, and planners in the public sector, the path forward is clear. Embracing modern planning solutions is paramount for enhancing efficiency, transparency, and strategic agility. The journey toward data-driven decision-making and integrated planning begins with the willingness to leave behind outdated tools and embrace the future.

Decision Lens: The Modern Integrated Planning Software

As we conclude this eBook, let us remember that the goal is not just to keep pace with the evolving landscape of public sector financial management but to lead the way. By adopting modern planning solutions, we can transform the challenges of today into the successes of tomorrow.

About Decision Lens

Decision Lens is integrated planning software which modernizes how government prioritizes, plans, and funds. Leveraging our unique expertise in decision science, customers across the Department of Defense, intelligence community, and federal civilian agencies achieve a sustained operational advantage through superior long-range planning, continuous medium-range prioritization, and short-range funding execution.

Decision Lens addresses the shortcomings of the current defense budget system by developing cutting edge technology, relying on process re-engineering best practices, and hiring experts who get organizations to realize value quickly. With Decision Lens, the DoD will realize the agile, accountable, and collaborative approach required to retain US global dominance.

Learn more at www.decisionlens.com