FREE CHECKLIST

Has Your Partner Program Outgrown Excel?

The 12-point check: tick what is true today, add up, and read the guide on page 2.

1. About your program

Organization	Program	Partner organizations (number)

People who update the tracker	Completed by (name, role)	Date

2. Tick what is true today

DATA

- [ ] **1. Nobody is sure which file is the current one**
  You notice it: two colleagues quote different numbers for the same partner.
  It costs: decisions on stale numbers, and hours spent reconciling.
- [ ] **2. The spreadsheet has turned into a database**
  You notice it: tabs per year, columns added each quarter, lookups only one person can explain.
  It costs: more cells, more places for an error to hide.
- [ ] **3. Last year's status has been typed over**
  You notice it: "Where was this partner a year ago?" means digging an old copy out of e-mail.
  It costs: you can report a position, never a trajectory.

PEOPLE

- [ ] **4. The tracker depends on one person**
  You notice it: when its owner is on leave, nothing gets updated.
  It costs: the program's memory leaves with that person.
- [ ] **5. Updating the tracker eats the time meant for partners**
  You notice it: hours a week go into copying e-mails into cells.
  It costs: staff time spent on the file, not on the partners.

PARTNERS

- [ ] **6. Partners do not know where they stand or what comes next**
  You notice it: partners ask "what do you need from us?"
  It costs: progress depends on your chasing, not on their initiative.
- [ ] **7. You chase partners for things they already sent**
  You notice it: "I sent that in March." The evidence sits in an inbox.
  It costs: partner goodwill, and documents you cannot find at audit time.
- [ ] **8. You cannot show a partner its record without showing everyone's**
  You notice it: you send each partner an extract, and merge it back.
  It costs: more copies, more merging, and partners see their data once a year.

REPORTING

- [ ] **9. Report season means weeks of merging and checking**
  You notice it: totals change between the first and the third draft.
  It costs: weeks of staff time, and numbers you cannot defend.
- [ ] **10. Simple questions take a day to answer**
  You notice it: "How many partners are at stage 2?" gets "I'll come back to you."
  It costs: leaders stop asking, and decide on impressions.

RISK

- [ ] **11. Personal data travels in attachments**
  You notice it: contacts' names, e-mails and phones sit in copies nobody can count.
  It costs: every copy must be kept accurate, deleted on time and protected.
- [ ] **12. A wrong number has already reached a report**
  You notice it: a total did not match, or a formula's range stopped before the newest rows.
  It costs: credibility with your board, donors and partners.

Your score

Count the ticked boxes, then read what it means on page 2.

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3. What your score means

0–3 Stay on Excel

Excel is doing its job. Keep it, and keep it tidy.

- One master file with version history, one owner, one backup
- Drop-down lists instead of free text for every status
- Save a dated copy every quarter, so the history survives

4–6 Excel is straining

Fix the process before you change the tool.

- Partners update through one form, not their own copies
- Write down the stages, topics and what each step asks
- Plan the move before your next annual cycle or growth step

7–9 You have outgrown it

Move the system of record within the next cycle.

- Start with each partner's current position and open items
- Give each partner a view of its own record, and only that
- Keep Excel for analysis, fed by exports

10–12 It is already costing you

Errors and lost partner time are likely happening now.

- Freeze the spreadsheet's structure and name one owner
- Check the numbers in your last report against their sources
- Plan the move now; do not wait for the annual cycle

Fewer than 10 partners and one coordinator? Read your score one band lower: most of these signs grow with the number of organizations and people who touch the file.

4. Your top three signs, and what they cost

Sign (number and name)	How it shows up for us	Hours a month (estimate)	Who feels it

5. Next steps

Action	Owner	By when

6. If you decide to move

- [ ] Name one owner for the move, and one person on each side who answers questions
- [ ] Write down the program's structure: stages, topics and what each step asks of a partner
- [ ] Bring each partner's current position and open items; archive the old files, read-only
- [ ] Tell partners what changes for them, what they will see, and that it costs them nothing
- [ ] Keep an export for Excel, so the analysis your team knows carries on

Keep Excel for what it does best: analysis, models and the chart in a board paper.

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