

Operations Excellence Forum

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Moving operational processes off spreadsheets: a low-code operating model

This practitioner briefing sets out a vendor-neutral approach for manufacturers seeking to digitise approvals, maintenance and intake processes that currently run in spreadsheets and email.

Why act

Spreadsheet- and email-based operational processes scale poorly across sites: exception rules drift, visibility is retrospective, and management reporting depends on manual consolidation. As organisations add sites, the administrative cost compounds.

Recommended practices

- **Start with one process, two sites.** Prove the pattern on a single high-friction process (capital approvals are a common choice) before scaling.
- **Keep one application, scope by site.** Avoid per-site copies; use a site attribute and centralise exception rules so they can change without redevelopment.
- **Integrate, don't replace.** Connect the new process layer to incumbent CRM and ERP so data flows rather than duplicates.
- **Govern citizen development.** Enable business-led app building within clear guardrails, review gates and naming conventions.
- **Report from live data.** Once processes are on-platform, replace manual reporting with dashboards drawn directly from the process data.

Common pitfalls

- Automating a broken process instead of redesigning it first.
- Allowing ungoverned app sprawl with no ownership or standards.
- Underestimating change management for plant and regional teams.