

Shadow Spreadsheet Migration Tracker

Domain Methods

USE THIS WHEN A SPREADSHEET STILL RUNS A WEEKLY OR MONTHLY MEETING

The goal is not to ban spreadsheets. The goal is to replace one reporting dependency at a time without breaking the meeting rhythm people still trust.

FOR THE SPREADSHEET YOU ARE REPLACING, WRITE DOWN

- Meeting or cadence it supports
- Current spreadsheet owner
- KPI or decision the sheet is carrying
- Manual fixes or caveats added every cycle
- Stakeholders who trust the sheet more than the official source

REPLACEMENT PLAN

- Best replacement shape: dashboard, decision brief, board-pack input, CRM view, or workflow alert
- Named owner of the replacement
- Confidence level required: directional, decision-grade, or board-grade
- Parallel-run length in live cycles
- Shutdown date target

CONTROLLED FALLBACK RULE

- What can stay manual temporarily
- Who is allowed to approve that exception
- What gets logged when fallback is used
- What must be fixed before the next cycle

ROLLBACK RULE

- What failure would force one more cycle on the spreadsheet
- Who decides that rollback
- How the team will communicate the rollback before the meeting starts

DO NOT MIGRATE FIRST IF

- The KPI is still politically unstable across teams
- Nobody can explain the spreadsheet formulas or caveats
- The board, forecast, or compensation use case still lacks a clear confidence label

MEETING CLOSEOUT

- Did the replacement answer the real question?
- Did anyone reopen the spreadsheet during the meeting? Why?
- What trust break is still unresolved?
- Is the sheet safe to retire after this cycle?

FINAL OUTPUT

- Next spreadsheet-backed meeting to replace:
- Owner of the next migration:
- First fix to make before the next cycle: