

# HOW TO MOVE FROM SPREADSHEETS TO REAL-TIME DECISIONS

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# Technology that fits. Finally.

Spreadsheets multiply. Metrics conflict. Leaders hesitate. Most “dashboard projects” fail because the data underneath isn’t governed or reliable. The fix is not a prettier chart, it’s a reliable data foundation and a focus on the decisions your dashboards inform.

Leaders need to trust their numbers, move fast, and get dashboards people actually use. When data is scattered or stale, teams spend more time manually pulling and manipulating data, debating about “which number is right” rather than acting on anything. Decisions slow down, debates drag on, outcomes are missed.

The starting point isn’t AI or dashboards — it’s clarity on the decisions leaders want to strengthen and the outcomes that matter most. This guide gives executives and IT leaders a practical path to data they believe in and reporting that actually changes how the organization works.

## What you’ll take away from this guide

- A practical way to build a trusted data backbone without boiling the ocean
- Patterns that make business intelligence and reporting stick
- Where AI belongs (and doesn’t) in your next 90 days



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# The fast path

Assess —> Pilot —> Scale

Leaders are surrounded by data, but still lack the insight they need to act with confidence. Most organizations collect more information than they can use, leaving teams stuck between spreadsheets, dashboards, and conflicting metrics.

Cut through the overload by focusing on the few decisions that truly move the organization forward, supported by a digital strategy where systems work together. Clarity comes from insight and direction. With steady data foundations in place, teams can layer in AI capabilities that reinforce goals.

## Assess

2 – 3 weeks

- Inventory priority data sources; identify owners and refresh cadences
- Define 5 – 7 “decisions we need to make faster” (these become dashboard stories)
- Establish a unified data infrastructure for the top 3 – 5 priority data sources
- Align security and permissions early (who sees what)

## Pilot

30 – 45 days

- Ship one executive scorecard (KPIs, trend, variance, three drill paths)
- Ship one operational dashboard (daily/real time, clear “next/ongoing” action)
- Establish a change management strategy and usage feedback loop

## Scale

next 45 days

- Expand to the next 2 – 3 use cases and related data sources
- Introduce applied AI (forecasting, anomaly detection, natural language Q&A over governed data)
- Automate lineage and refresh alerts; formalize dashboard lifecycle (retire what’s not used)



# Why milestones matter

Analytics programs often fail quietly — not because of technology, but because progress is hard to see. Milestones create visibility and help leadership understand when the data is shifting from raw information to something that supports faster, more confident decisions.

They also help keep teams from slipping into analysis paralysis by anchoring the work to clear outcomes rather than endless refinement.

## By day 30:

- Data backbone live (priority sources)
- One executive dashboard + one operational dashboard in preview

## By day 60:

- Dashboards in production
- Usage telemetry and measurable outcomes
- Draft AI use case defined

## By day 120:

- First AI enhancement live
- Add 2 – 3 new dashboard stories
- Retire redundant reports





# Industry-specific moves

Each industry wrestles with different forms of data overload.

By unifying sources and surfacing trends, leaders can spot issues earlier, uncover margin shifts, and respond to operational changes before they escalate. These quick plays focus on areas where organizations already have the data they need, but lack a way to access or interpret it.

- **Health care** — Unlock EHR data and combine it with financial data to improve operations, enhance patient outcomes, clarify provider compensation, and impact the revenue cycle.
- **Manufacturing** — Unify ERP and production data for throughput, yield, and margin views; add predictive maintenance anomalies for critical assets.
- **Nonprofit** — Consolidate program and grants data into one view; produce board-ready outcome summaries; align constituent and fund records to remove double counting.
- **Financial services** — Build executive dashboards across core and ancillary systems; identify outliers and apply AI to flag trends in exception queues.
- **Retail** — Unify POS, ecommerce, and customer feedback data to track buyer sentiment in near real time; flag shifts in demand, promotion response, and friction points before they show up in sales results.



# Metrics that matter

Metrics matter because they show whether the work is advancing organizational strategy, not just generating more reporting.

The right metrics reveal whether your analytics program is delivering insight that fits the organization, or is just producing more charts. They help leaders move past hindsight, focus on forward-looking signals, and track whether dashboards are becoming a dependable source of truth.

## KEY NUMBERS TELL THE REAL STORY

- **Time to insight** — This metric shows how fast your team transforms raw data into something leaders can use. Faster cycles help decisions track closer to real activity.
- **Manage data downtime** — Failed data and stewardship processes impact decisions the way a retail web site outage impacts sales. How frequent is your data downtime? How long do outages last? When data downtime is well managed, trust rises and dashboard debates fall away. Misses usually point to weak ownership or unreliable pipelines.
- **Dashboard adoption (weekly active viewers, action taken)** — High adoption means dashboards are answering real questions and replacing manual reporting. Low adoption signals unclear stories or weak data.
- **Forecast accuracy / anomaly precision (for AI use cases)** — These metrics show whether AI adds clarity or distraction. Good performance means teams can anticipate issues instead of reacting late, especially when the AI use case follows the organization's goals and has guardrails for accuracy and review.





# Common pitfalls

Analytics efforts often falter under the weight of too much data and too little direction. Tools multiply, dashboards spin up, and the questions leaders care about most still go unanswered. Without governance, ownership, and a clear focus on decisions, even advanced technology can leave teams guessing. Avoid these traps:



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## Boiling the ocean

Model high impact data domains, such as sales or employee turnover, first. Demonstrate value quickly and iterate.



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## Designing for everyone

Understand your audience, and split executive (overview) and operations (action) views.



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## Skipping governance

Name data owners and stewards on day one, and align on who defines and maintains key metrics.



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## Launching AI tools without direction

Introduce AI only when the decision needs, governance steps, and data foundations are already established.



# Analytics action checklist

A focused checklist helps teams move from scattered data toward clarity and outcomes that matter.

It keeps the work tied to decisions, not dashboards, and prevents teams from slipping back into silos, rework, or month-end surprises. These items anchor the first 90 days and reflect what leaders consistently ask for: dependable data, clear stories, and early insight.

- Top sources inventoried and owners named** — This gives you a clear map of where your data lives and who keeps it current, which helps prevent silos and inconsistent reporting.
- Two dashboards defined by the decisions they support** — Starting with the questions leaders need answered keeps the build focused and avoids dashboards that look good but don't drive action.
- Change management strategy in play** — Active execution helps drive adoption, reduce disruption, and sustain behavioral and process changes across the unified infrastructure program.
- Data dictionary page started; data downtime management plan set** — Documenting key fields and setting refresh rhythms builds trust early and helps teams understand what the numbers actually represent.
- Roles and permissions confirmed for each dashboard** — Clear access rules stop confusion and help avoid duplicate versions of the truth spreading across departments.
- Usage telemetry prepared (viewer counts, adoption signals)** — Knowing who's looking at dashboards and how often tells you what's working and where you may need to adjust the story.
- One AI enhancement identified (forecast, anomaly, or Q&A)** — Choosing a single, practical AI use case (tied to a specific business decision) helps teams dip their toes into predictive insight without overcommitting too early.
- Pilot feedback loop established to capture changes from day one** — Setting up a simple way for users to give input helps refine dashboards quickly and improves engagement.



# From data to direction

You've seen how scattered data slows teams down and how a small, dependable backbone can reshape decision making. The goal is straightforward: faster insight, clear ownership, and dashboards people trust with technology that fits. The first step is a short conversation that aligns your goals with the data needed to support them.

## A digital approach built for people

A digital readiness assessment outlines your current state, highlights the highest-impact dashboard stories, and maps out a 90-day plan to ship business intelligence that leaders actually use. It also helps clarify your AI strategy and identify how it can support forecasting, detection, and natural-language questions — and where it shouldn't be applied yet.

When you're ready, CLA can walk you through sample dashboards, help evaluate your data sources, and provide a draft timeline and resource plan tailored to your reporting needs.

Schedule your digital readiness assessment today.



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