

# Navigating the Shift From Excel-based GRC to modern platforms

Many organizations begin their GRC journey using spreadsheets – the original, de facto GRC tool. While useful initially, complexity eventually demands a move to a modern, dedicated GRC platform. This transition is often where things go wrong, leaving us asking:

## Why do so many GRC tool implementations stumble and fail?

According to Aaron Pitz and Cody Rivers from Reveal Risk, moving from a familiar spreadsheet environment to a sophisticated GRC platform requires careful navigation. Without a clear strategy, organizations risk investing significant time and resources into a solution that doesn't meet their needs, hinders their processes, or fails to gain user adoption. The key is shifting from reactive tool shopping to proactive process definition and stakeholder alignment.



Aaron Pitz  
Tech Guru  
Reveal Risk



Cody Rivers  
Mr Excel  
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## Common Pitfalls

- 1 Choosing a tool that isn't fit for your specific GRC task, perhaps because another department uses it successfully for something different (like SOX)
- 2 Selecting a platform so tech-heavy that even minor configuration changes require months of engineering effort, stalling progress.
- 3 Picking an inflexible tool that forces you to abandon your established, effective internal processes just to fit its limitations.
- 4 Believing vendor hype over reality. Perfect, solve-all-problems GRC tools simply don't exist.

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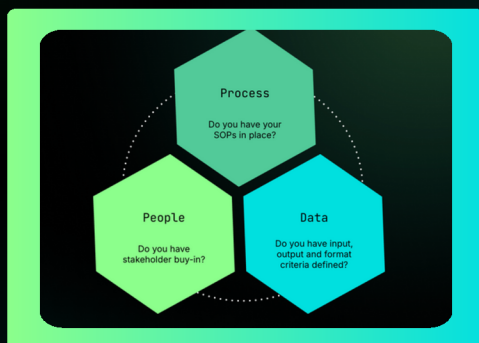
Your process drives tool selection, **not the other way around.**

Reveal Risk

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Graphic representation of stakeholder engagement in the RFP process



Graphic representation of the three considerations for RFPs: Process, People, and Data



## From Excel-based GRC to modern platforms

Before you even think about vendor demos or RFPs, the crucial work happens internally. Success hinges on meticulous preparation and active engagement.

### Tips for RFP Success

1

#### Define Processes & Data First

Document your GRC use cases, SOPs, and data requirements (inputs/outputs) before evaluating tools. Use current tools like Excel to refine these.

2

#### Engage Stakeholders Early & Often

Secure executive sponsorship and actively involve daily power users in the process; understand reporting needs and communicate frequently.

3

#### Set Clear Requirements & Criteria

Agree on specific evaluation criteria based on your defined processes and needs; create a bake-off matrix for objective comparison.

4

#### Prioritize & Be Realistic:

Focus on critical needs first and understand no tool is a perfect "unicorn"; requirements will evolve.

5

#### Demand Tailored Vendor Demos:

Don't settle for stock presentations; require vendors to demonstrate how their tool meets your specific, defined process and use cases.

By investing heavily in understanding and documenting your internal processes, data, and stakeholder needs before evaluating GRC platforms, you fundamentally change the selection dynamic. You move from reacting to vendor features to proactively seeking a tool that supports your defined way of operating. This process-driven approach dramatically increases the odds of choosing a platform that fits your organization, leading to successful adoption, increased efficiency, and achieving the true potential of modern GRC.