

Confessions from Spreadsheets Anonymous (and the way out)



A practical guide to getting IT budgeting and forecasting out of “Final_v9_REALLY_FINAL.xlsx”

If budget season feels like Groundhog Day, you're not imagining it.

Welcome to Spreadsheets Anonymous—where the “final” file has 14 clones and nobody knows which one is real!

Approvals live in reply-all, mistakes are rampant and a simple question can take weeks to answer. This guide is for CIOs, CFOs, FP&A, IT finance professionals and anyone who longs for faster budget cycles, defensible numbers, tighter forecasting and more informed decision making.

Inside, we're practical and direct: where spreadsheets excel (as a personal modeling workbench), where they break down (as a process), and what “good” looks like when planning runs in an ITFM platform. Expect checklists, repeatable patterns, and real examples you can use with stakeholders. There's even a glossary at the end for any unfamiliar terms.

This guide shows a practical way out: run the process where it belongs (an IT Financial Management platform), keep spreadsheets where they shine (analysis), and get answers in minutes — not weeks.

CONFESSION FROM SPREADSHEETS ANONYMOUS

“We didn't plan to start a support group—Excel just broke us at the same time.”



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**CONFESSION
FROM SPREADSHEETS
ANONYMOUS**

“We thought
‘budget season’ was
just supposed to hurt
this much.”



16 Signs It's Time to Leave Spreadsheet IT Planning in the Past

16 Signs It's Time to Leave Spreadsheet IT Planning in the Past

1 Weeks to answer simple questions.

Leadership asks routine questions and the team bounces between files before anyone can assemble a trustworthy answer.

“Hi, I’m Mei, and by the time I had the answer, the question had grandkids.”

2 Formulas, versions, copy-paste — pick your poison.

Silent formula errors, broken links, copy-paste slips, and one-off hard codes produce three different “truths.”

“Hi, I’m Priya, and my VLOOKUP has commitment issues.”

3 Analysts reconcile; they don’t advise.

Most analyst hours go to stitching data and fixing links instead of planning with stakeholders.

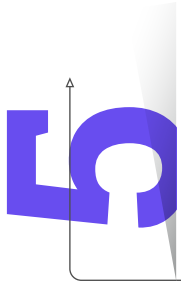
“Hi, I’m Jordan, and my career path is ‘Pivot Table → Senior Pivot Table.’”

4 Decisions wait while numbers argue.

Meetings get consumed by proving the number instead of choosing priorities.

“Hi, I’m Nico, and our business case lost to ‘why does this column say 0?’”

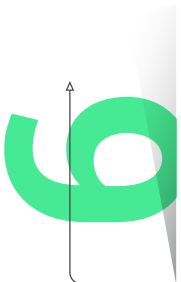
16 Signs It's Time to Leave Spreadsheet IT Planning in the Past



Shadow accounting everywhere.

- Teams keep their “real” numbers in offline spreadsheets, so multiple truths persist after “final.”

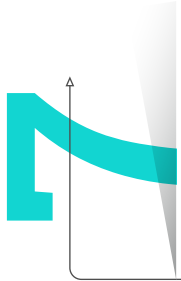
“Hi, I’m Mark, and my secret budget is called ‘totally_not_the_real_numbers.xlsx.’”



Owners can’t see their true budget.

- Budget holders lack a clear view of budget vs. actuals (or obligations), so surprises hit late.

“Hi, I’m Carla, and I found out I was ‘over budget’... from Finance’s slide at the meeting.”



Budget season feels like it never ends.

- Active cycles run for weeks, and revisions stretch for months—burning labor and opportunity cost.

“Hi, I’m Tasha, and my calendar has four seasons: Prep, Budget, Rebudget, Rebudget.”

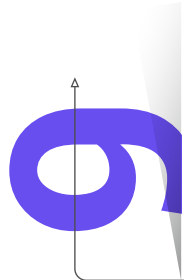


Variance explanations are a monthly rerun.

- With no lineage or notes, the same variances must be re-explained every month.

“Hi, I’m Ben, and I’ve explained the same \$87K three times—now with emojis.”

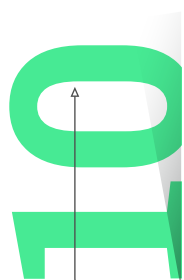
16 Signs It's Time to Leave Spreadsheet IT Planning in the Past



Nights and weekends, lost to consolidation.

The “Excel jockey” shoulders late-night merges and becomes a burnout-risk single point of failure.

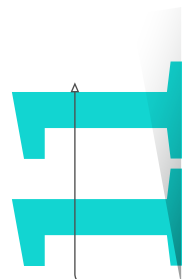
“Hi, I’m Dev, and I brought my laptop to date night. Again.”



You can’t model changes in real-time.

A 10% cut, FX update, or merit tweak requires hours of manual surgery across tabs—not instant, governed what-ifs.

“Hi, I’m Omar, and we order pizza when someone says ‘just tweak the merit %.’”



One person holds the plan together.

The budget depends on a single “Excel expert”; without them, no one can run or fix the model.

“Hi, I’m Brooke, and today I audited a formula that’s older than my laptop.”



Spend ≠ value: CIO–CFO misalignment.

IT plans in services and projects while Finance needs GL-mapped outputs; without translation, trust stalls.

“Hi, I’m Laura, and I speak EBITDA; my CIO speaks innovation—we need help.”

16 Signs It's Time to Leave Spreadsheet IT Planning in the Past

13

Forecast error keeps topping 5%.

Recurring variance beyond tolerance signals structural process and data issues, not just “bad inputs.”

“Hi, I’m Sam, and I hit the target—plus or minus a rounding error called 23%.”

14

Approvals live in email—no audit trail.

Reply-all sign-offs and screenshot “evidence” slow decisions and won’t pass scrutiny.

“Hi, I’m Parker, and my approval workflow is a reply-all.”

15

No published & locked plan.

If edits continue after “final,” IT and Finance are never on the same version of truth.

“Hi, I’m Casey, and I’m on my 14th ‘final.’”

16

No rolling plan; annual rebuilds forever.

Without a living forecast, you rebuild every year instead of adjusting continuously.

“Hi, I’m Maya, and I think I’m trapped in a budget time loop.”

16 Signs It's Time to Leave Spreadsheet IT Planning in the Past

=SUM

0–2 points — [Spreadsheet Tourist]

You visit Spreadsheetland, but you don't live there.

Do next: Document what's working; borrow a few practices from later chapters to stay ahead.

3–5 points — [Early Warning Lights]

You're feeling the drag—nothing catastrophic yet, but the dashboard is blinking.

Do next: Audit your current process and start learning about ITFM platforms (including Nicus).

6–9 points — [Budget Season Regular]

You're stuck in the cycle. Analysts reconcile more than they advise, decisions wait while numbers argue, and “final” is plural.

Do next: Start an ITFM platform evaluation as soon as current budget ‘season’ is over.

How to Score Your Organization

Give yourself 1 point for each sign that describes your budgeting cycle. Add them up (0–16) and find your range.

10–13 points — [Spreadsheets Anonymous]

You know all the confessions by heart. Shadow accounting, variance reruns, pizza-fueled what-ifs—the works.

Do next: Start an ITFM platform evaluation as soon as current budget ‘season’ is over.

14–16 points — [Emergency Exit Row]

This isn't a process—it's a hostage situation.

Do next: Treat this as urgent. Engage an ITFM platform (like Nicus) now.

Bottom line:

If even a handful of these feel familiar, your spreadsheet-based IT planning isn't “scrapy” anymore — it's slowing answers, distorting numbers, burning out people, and eroding trust between IT, Finance and business leaders. It's time to replace ad hoc files with a single, governed planning platform that everyone can rely on.

**CONFESSION
FROM SPREADSHEETS
ANONYMOUS**

“We’re running a multi-billion-dollar tech budget out of files named Final_v9_REAL_THIS_TIME.xlsx.”



Why Spreadsheets Stall Planning

Why Spreadsheets Stall Planning

Let's be honest: spreadsheets are fantastic for analysis and quick “what happens if...?” noodling.

But once you try to run an enterprise IT planning cycle in them—across dozens of budget owners, thousands of line items, shifting headcount, contracts and renewals, cloud commitments, and allocations—the wheels wobble. And then they come off. The result is longer cycles, errors, slower decisions, and numbers that erode confidence. To put a financial lens on the problem, this could result in millions of dollars of wasted labor hours, misaligned costs driving the wrong business decisions and tens or hundreds of millions of dollars of capital not being deployed against strategic priorities.

This chapter explains why those problems keep recurring, so the path forward is obvious later.

IT planning needs detail that spreadsheets can't carry

IT doesn't plan in broad buckets; it plans in the components that make services, applications and business capabilities function. That means thousands of line items, and each of those lines needs an owner. Finance will eventually roll it all back to cost center and account, but if the plan doesn't start with the right detail in IT, the roll-up won't be accurate or trusted.

In practice, budget owners need to see the budget the way they run the business. The business never asks for “salary, travel, training, software and telecoms”; they ask for capabilities—“the CRM upgrade,” “secure remote work,” “a new claims system.” Each capability (or service) is a bundle of IT components that cut across vendors and categories. In a spreadsheet, representing that bundle typically means helper tabs, cross-links, and manual tagging. It can work for a while, but it doesn't scale when you're assigning thousands of lines to dozens of owners and trying to keep the IT view in sync with the general ledger (GL) view.

Planning at this level also means easy access to POs, invoices, and contracts while you build the plan. You need to see actual renewal dates, escalators, and true committed spend—not last year's numbers dragged forward. Excel can't natively join those sources in a governed way; you end up with file attachments, paste-ins, or brittle connections that break permissions and slow everything down. The result is re-keying, out of date assumptions, and “we'll fix it later,” which quietly becomes “we never fixed it.”

The details are what unlock better forecasting. Without that backbone, every adjustment becomes a hunt through tabs and emails, and forecasts become increasingly inaccurate.

Why Spreadsheets Stall Planning

Version sprawl and errors block a single source of truth

When planning lives in spreadsheets, errors aren't rare—they're expected. [Research](#) shows that between 46% and 94% of operational spreadsheets contained at least one error. A quiet hard code, a pasted subtotal, a link to last quarter's file that no longer works... small slips multiply across copies and tabs. By the time the final deck comes together, it's hard to be 100% sure the number on slide 7 matches the workbook that fed it or even that the "final" workbook is error free. If the presentation contains an error, credibility takes the hit—first with Finance, then with leadership.

The cost isn't just reputational; it's time. Teams spend hours reconciling figures and re-checking workbooks before they can even start the conversation they came to have. And because the file grew organically, one person often becomes the only person who truly understands how it all fits together. That creates a single point of failure and a single pressure point. If that person is out, overloaded or leaves—the process pauses because the risk of breaking something is too high.

Answers that should take minutes, take weeks

Leaders ask simple, practical questions:

"Can we cut 10% without impacting service delivery?"

"What changes if the FX table moves by two points?"

"Can we slip these hires one quarter and still hit the plan?"

"If we commit to these AI projects, what is budget impact in years 2 and 3?"

In a spreadsheet-driven world, each of those questions turns into a project. One CIO told us a straightforward question takes six weeks for their team to answer. Six weeks isn't analysis; it's a decision that never had a chance to happen at the right time. The impact is real. Sometimes decisions are delayed and in other cases a decision gets made anyway—but without good data behind it.

Cost actions are where this really hurts. Without quick, trustworthy what-ifs, leaders default to blunt instruments: freeze external labor, cut travel, pause contractors. It's fast, but it's imprecise and often painful. That's very different to in-the-room scenario planning, where you can take a focused approach that aligns with strategic objectives.

Why Spreadsheets Stall Planning

Finance trust requires traceability to the ledger

Finance needs one published figure and a clear crosswalk to the GL—accounts, cost centers, and the assumptions behind them. In spreadsheets, that lineage is scattered across tabs and emails, which slows variance explanations, invites caveats and degrades forecast accuracy over time.

Misalignment also comes from how work gets done in IT. Budget owners keep their own versions of budget that hold the details and are organized in the way that works for them. Now you're living in a world of duplicate budgets, and none of them can line up without constant heavy reconciliation.

Email-driven approvals don't stand up as governance

Reply-all approvals and screenshot "evidence" are not a control. They're also a terrible way to coordinate change. Who approved which line? What changed after approval? What version did we publish? In spreadsheet-driven processes, the answers are buried in inboxes, comments, notes and side files. It also opens the organization to unintentionally sharing confidential information, such as salaries, with the wrong employees.

Governance isn't bureaucracy; it's the only way to move fast and be safe. A planning process needs clear ownership, role-based permissions, visible change notes, and a durable audit history of who did what, when, and why. Email cannot provide that.

Rolling and multi-year planning breaks down in spreadsheets

Budgets go stale quickly. The business changes, rates change, hiring slips, priorities shift. Healthy teams run rolling forecasts (12–18 months or more) and maintain multi-year views so they can adjust continuously rather than rebuild annually. Spreadsheets fight that reality.

Carrying forward run costs, applying effective-dated rates, and keeping labor baselines aligned to HR are all possible by hand—but not at speed, and not without errors piling up. This is how you end up in Groundhog Day: the same rebuild each year, the same debates, the same fixes rediscovered. A plan that can't stay living becomes a snapshot that ages badly.

Why Spreadsheets Stall Planning

Integrations are hard to manage by hand

Real planning depends on upstream systems: HR for headcount and labor costs, procurement and POs for obligations, ERP for actuals, cloud and tooling for usage, CMDB/asset data for context.

In spreadsheet processes, this means periodic CSV pulls, manual merges and rekeying.

When obligations aren't reflected on time, budget owners think they have room they don't. When actuals arrive on a different timeline or with a different structure than the plan, reconciliation delays action. The more data feeds you manage manually, the more of a challenge this is. None of this is controversial; it's simply the friction you accept when you ask a document to do a system's job.

The people costs are real

Behind every spreadsheet process is a human tax. Analysts spend more time reconciling than advising. Budget owners avoid participating because the files are intimidating. A single "Excel expert" becomes the consolidator, working nights and weekends to make everything tie out—until they burn out or leave, and the model dies.

There's also an opportunity cost. Hours spent rebuilding and reconciling are hours not spent prioritizing investments, renegotiating vendors, tuning unit rates, or preparing clear stories for leadership. The labor cost can be seven figures annually; the missed opportunities are larger.

When you can't see the decisions, you don't make them

[Interviews](#) with 45 executives and senior analysts revealed that most could recall concrete examples where spreadsheet errors had a direct hand in poor decision-making — including inaccurate budgets that influenced strategic priorities and staffing levels.

One quiet failure of spreadsheet-driven planning is the set of decisions that never even surface. Leaders know there are choices out there, but they can't see them clearly enough to act—so nothing moves. The pattern is predictable: projects get greenlit without a clear "build-to-run" view of the ongoing costs, technical debt accumulates in the background, and next year's operating load shows up as a surprise instead of part of the plan. When visibility is thin, organizations gravitate to whatever feels controllable. The result isn't just blunt cuts; it's missed opportunities to right-size investments, retire what should be retired, and shape the future run costs you'll live with for years.

Why Spreadsheets Stall Planning

Bottom line:

Spreadsheets aren't just a little clumsy at scale—they actively slow planning, hide risk, strain people, and undermine trust in the numbers. When the tools can't carry the detail, lineage, governance, and integrations IT planning needs, decisions get delayed, distorted, or never made at all.



The Horror is Real

Real budgets have been derailed by tiny spreadsheet mistakes—misplaced signs, broken formulas, version mix-ups, copy-paste chaos. Don't let your next “final” be a confession.

[Read Spreadsheet Horror Stories](#)



CONFESSION FROM SPREADSHEETS ANONYMOUS

“Our translator used
to be one very tired
analyst with color-
coded tabs.”



Plan Like IT, Reconcile Like Finance

Plan Like IT, Reconcile Like Finance

How IT Financial Management (ITFM) translates intent into finance-ready outputs

IT and Finance are solving the same problem from different directions. IT thinks in services, applications, business capabilities, infrastructure, vendors, and people. FP&A needs cost center and account by period. The translation step—done well—turns IT’s operational intent into numbers Finance can book and defend, without losing the detail IT needs to run.



A real translation in practice

Persona: Ivan, IT Budget Owner (Application Owner)

Scenario: Ivan needs to hire an additional FTE

Finance question

What is your cost center?

Ivan’s answer (natural IT response)

My team’s cost center?



ITFM (translated response)

Cost Center **1234** (Ivan’s owning org) will hold the expense for this FTE.

Finance question

What level are you hiring for?

Ivan’s answer (natural IT response)

A specialist.



ITFM (translated response)

Grade **G** at mid-range **\$100K** base; apply **20%** for benefits (fully loaded \$120K).

Plan Like IT, Reconcile Like Finance

Finance question

When do you want the FTE to start?

Ivan's answer (natural IT response)

As soon as possible—tomorrow.



ITFM (translated response)

We will forecast the start **three months from today** to reflect realistic recruiting lead time.”

Result – ITFM sends the request to finance as:



We are adding **1 FTE (Grade G)** to **Cost Center 1234**, fully loaded **\$120K** annually, starting **May 1** of this year. Amount is fully loaded and aligns to Finance's comp/benefit tables.

What just happened:

1. IT's operational need (meet SLA) was captured in IT's terms.
2. ITFM applied **finance policies** (grades, midpoints, benefits) and **timing rules** (realistic start).
3. The output matched Finance's structures (cost center, account mapping, fully loaded amount, effective date).
4. Both sides can now track the decision in plan → forecast → actuals without re-explaining it next month.

Plan Like IT, Reconcile Like Finance

Seven common translation pattern Examples

Each pattern starts with how IT frames the change, then shows what the translator captures, and ends with exactly what Finance needs to book it cleanly.

1. Headcount addition (new hire)

IT asks: “Add an FTE to meet SLAs on the CRM team.”

Translator captures: Role/title, team, realistic start date, grade/midpoint, benefits %, funding source.

Finance needs: Cost center, account, grade, fully loaded annual amount, effective start date, split by month/period (prorated if needed).

2. Headcount removal (attrition/backfill hold)

IT asks: “We’re not backfilling this engineer for Q2–Q3.”

Translator captures: Role, current grade and cost center, pause window, backfill plan (if any).

Finance needs: Cost center, account, reduction to fully loaded amount by effective dates, note if removal is permanent or time-boxed.

3. Headcount promotion/transfer (change in grade and/or org)

IT asks: “Promote this specialist to senior and move them to the Data Platform team on July 1.”

Translator captures: Old/new grade, old/new cost center, timing, comp delta, any one-time costs.

Finance needs: Split entry by date:

- **Through June 30:** old grade, old cost center, fully loaded.

July 1 onward: new grade, new cost center, updated fully loaded, one-time costs (if applicable).

4. Vendor renewal with escalation

IT asks: “Renew observability tool; contract steps up 7% on Jan 1; add 50 seats.”

Translator captures: Contract ID, SKUs/units, escalation %, seat delta, term, tax treatment if applicable.

Finance needs: Cost center(s), account(s), effective date, new monthly/annual amount, prepaid vs expense timing, tax where relevant.

Plan Like IT, Reconcile Like Finance

5. Cloud commitment right-size (or usage shift)

IT asks: “Increase commitment by 20% to cover new analytics workloads; shift dev to spot.”

Translator captures: Current commit, unit rates, services moving, tags/projects affected, ramp plan.

Finance needs: Cost center/account mapping by service, month-by-month impact, assumptions (rates, discounts), any reclass/chargeback updates.

6. Project → run tail (build-to-run)

IT asks: “Launch Claims Modernization by Q3.”

Translator captures: One-time build costs vs. ongoing run: licenses, hosting, support, FTE, vendor care, start dates.

Finance needs: CapEx vs OpEx split, run-rate starting month, accounts/cost centers, depreciation (if any), renewal cadence.

7. Allocation/showback change (driver or rate update)

IT asks: “Update service X driver from headcount to consumption; revise BU rates.”

Translator captures: New driver source, rate math, impacted BUs/services, go-live date.

Finance needs: Allocation journal entries by period, rate card, driver extract reference, change note (what/when/why) for audit.



Plan Like IT, Reconcile Like Finance

What to watch for (quick pitfalls)

No source documents. Renewals or adds without the PO/contract attached turn into guesswork later.

Dates that don't line up. Effective start/end dates applied in one place but not another create month-end surprises.

Title isn't grade. Promotions entered as titles only (no grade/comp change) leave the dollars wrong.

Decisions made off to the side. Approvals or tweaks made in email or a shadow sheet never make it to Finance's view.

Driver/rate changes without a note.

Allocation updates go live with no "what/why/when," and variance explanations balloon.

Split entries missed. Transfers and mid-period changes need a before/after line—otherwise the plan won't match actuals.

Tax and cash timing ignored. Sales/use/VAT and prepaids vs. expense timing can shift the number even when the total looks right.

Bottom line:

IT and Finance don't actually disagree—they just speak different languages. ITFM provides the translator: it captures changes in the way IT thinks (services, people, vendors) and converts them into clean, finance-ready entries (cost centers, accounts, timing, and rates), so every decision flows traceably from intent to plan to forecast to actuals.

**CONFESSION
FROM SPREADSHEETS
ANONYMOUS**

“Our FP&A team doesn’t hate IT—they just don’t trust our spreadsheets before coffee.”



How ITFM Helps FP&A

Same Goal, different lenses

FP&A and IT want the same outcome: a number the business can trust and act on. Conway's Law is a useful reminder here: we design systems that mirror how we communicate. IT and Finance have built tools that fit how they work, and they're both right for their jobs and the services they deliver. The trouble starts when we try to force one group to plan in the other's system.

In practice, that gap shows up every month. IT brings the operational story—service SLAs, new business capabilities, AI adoption—while FP&A needs the bookable version of the same intent: cost center and account, effective dates, fully loaded amounts, supporting evidence.

This chapter is about how an IT Financial Management (ITFM) platform helps FP&A, working alongside FP&A processes and their corporate planning tool.

What FP&A actually needs from IT (and what it doesn't)

FP&A isn't asking IT for a new way to tell the story—they're asking for a number they can book and defend. That means the IT plan has to arrive already translated into finance's language: cost centers and accounts, effective-dated amounts, clear ties to the GL, and enough context to explain variances next month without a scavenger hunt. When that shows up cleanly, forecast cycles shorten, monthly close is calmer, and everyone argues less about "which file" and more about actual choices.

What FP&A doesn't need (and won't use)

- Unmapped IT views (apps, services, environments) without a finance mapping.
- Side files and screenshots as "evidence."
- Endless scenarios that never materialize.
- Manual currency conversions and cost allocations done differently in different sheets.

How ITFM Helps FP&A

Why this matters to FP&A

When the IT plan shows up reconciled and “variance-ready,” Finance spends less time policing the process and more time shaping outcomes—cash timing, tax impacts, margin targets. Forecast accuracy improves not because Finance asked harder, but because the inputs arrived in their language the first time.

Why corporate planning tools alone aren't enough for IT

Corporate planning tools are excellent at enterprise rollups, target setting, and the monthly/quarterly close—organized by account and cost center. Where they fall short is where IT actually lives—business services and applications; on-premise and cloud infrastructure (compute, storage, network, end-user, service desk); labor and assets to name a few. That's why the “real” IT plan so often spills into spreadsheets.

Let's start with **detail and ownership**. IT planning isn't a handful of totals; it's thousands of lines of costs. Research and advisory firm Gartner, Inc., reports that often “users underestimate the high level of granularity and detail required to build an effective IT budget.” Most corporate models capture totals well, but they don't comfortably carry this operational detail. Teams either simplify the plan to fit the tool, or keep parallel sheets to preserve the truth.

Then there's **timing and multi-year reality**. Merit cycles. FX moves. Contract step-ups. Hiring slips. CapEx vs. OpEx and depreciation. Each change needs effective dates and consistent application. If every tweak requires manual work or a custom build, what-ifs slow down and timing errors creep in. Those errors show up later as avoidable variances—and rework no one budgeted for.

You also need **one number, many views**. Finance lives by account and cost center but IT service owners need to see the total cost to deliver their service. Application owners must track the full cost of the hardware, software, and labor behind their app. Business unit leaders need to understand their department's IT consumption and value. All those cuts must reconcile to the same underlying figure at the same time—otherwise teams rebuild the story for each audience and multiple “truths” reappear.

A well-run IT finance process tracks **real-time actuals** against the specific items in the forecast—not just totals. That's hard to do in most corporate planning tools. When variances only show up at the cost center and account level, teams burn hours digging through different sources and trying to match details in spreadsheets just to explain what moved and why.

How ITFM Helps FP&A

What Changes for FP&A

GL-ready numbers: One published figure mapped to cost center/account with effective dates (merit, start/end, renewals) and fully loaded amounts (benefits, taxes, overhead).

Lineage that holds up: Every change has a who/when/why, and lines tie back to contracts, POs, invoices, or headcount plans.

Variance-ready detail: Click from a rolled-up variance to the specific driver in minutes.

One number, many views: Finance (account/CC), IT (service/app), and BU (consumption/value) all reconcile to the same figure—no side files.

Rolling without rebuilds: Merit, FX, renewals, and timing changes carry forward automatically so forecasts update instead of restart.

In-room what-ifs: “Cut 10% but protect X,” “move these hires,” “apply new FX”—changes are applied once and the impact is visible immediately.

Governed ownership: Intake, approvals, and change notes live with the numbers; managed versioning establishes the source of truth.

Fewer handoffs: HR, procurement, ERP actuals, and cloud usage feed the plan directly; less email and fewer attachments.

Shorter cycles & better forecasts: With cleaner inputs and lineage, FP&A spends less time reconciling and more time shaping outcomes—with more timely, accurate forecasts.

Bottom line:

FP&A doesn't need a new IT story; it needs clean, GL-ready numbers that fully explain that story. ITFM fills the gap corporate planning tools can't—capturing IT's granular, service-level reality and translating it into mapped, traceable, variance-ready outputs. The result is one number with many aligned views, faster cycles, and forecasts Finance can trust without living in IT's spreadsheets.

**CONFESSION
FROM SPREADSHEETS
ANONYMOUS**

“We didn’t need
another macro; we
needed to stop living
inside the file.”



From Spreadsheets to an ITFM Platform

From Spreadsheets to an ITFM Platform

What is an IT Financial Management platform?

An IT Financial Management platform (or ITFM platform for short) is purpose-built software for managing the costs and value of technology. It consolidates financial and consumption data (GL, contracts, HR, cloud/usage), models costs and allocations, and automates budgeting, forecasting, variance analysis and showback/chargeback. Just as important, it links spend to outcomes—measuring service and portfolio value, aligning investments to strategic objectives—so IT, finance and business leaders can see where money goes, why it matters, and what to change.

What changes when you move off spreadsheets

Planning stops being a relay race of files. There's one place to enter changes, review them, publish a number, and know who touched what along the way. Budget owners work in the details they manage at the granularity that makes sense for IT. Finance still gets a number it can book and defend. The practical effect shows up fast: fewer caveats, faster answers, and forecasts that stay current instead of being rebuilt every quarter. It's the moment in Spreadsheets Anonymous when you realize the problem was never you—it was asking a document to do a system's job.

Who does what (and how they interact)

- **Budget owners** capture intent in plain terms: add a hire, renew a contract, shift timing, right-size cloud. They see their line items, their targets, and how changes roll up.
- **IT Finance** keeps the guardrails: mappings to cost center and account, fully loaded amounts, effective dates, and a clean publish/lock rhythm. They can also link evidence—POs, invoices, contracts, headcount plans—so every line ties back to something real.
- **FP&A** consumes the published, locked figures for close and forecast. IT Finance can immediately answer questions for them and trace a question back to source assumptions and data.

The back-and-forth becomes a quick review, not a scavenger hunt.

What the plan actually contains

The plan reflects how IT runs, not just how Finance works. You'll see labor (by role and realistic start), non-labor contracts and renewals (with increases when they exist), cloud units and commitments, support and maintenance, and assets that carry run costs forward. Reference data—grades/midpoints and benefits, FX tables, standard lead times—lives in one place so it applies consistently. Evidence sits with the lines that depend on it. No more "I think that renewal was 7%... where's the email?"

From Spreadsheets to an ITFM Platform

The monthly rhythm (forecast without the drama)

Each month follows a predictable flow:

1. **Open the period.** Actuals land; owners see plan vs. actual side by side.
2. **Owners update.** Adds, removals, timing changes, renewals—captured once, with notes.
3. **IT Finance reviews.** Guardrails apply automatically; questions get resolved in the record, not in reply-all threads.
4. **Publish & lock.** The figure is dated and shared. Everyone is looking at the same version.

Annual budgeting rides on top of this, not instead of it—so rolling forecasts stay alive and multi-year views don't require annual rebuilds.

Views and comparisons that reduce rework

Different audiences need different cuts of the same truth:

- **Finance** sees accounts and cost centers by period.
- **IT leaders** see services, applications, and vendors.
- **Business units** see consumption and value.

You can compare plan to actuals, plan A to plan B, or last quarter to this quarter without cloning files. Run a what-if analysis when you need to explore.

Governance, approvals, and access (no more reply-all)

Email approvals and screenshot “evidence” don't survive scrutiny—and they slow decisions. In an ITFM platform, intake, approvals, and change notes live with the numbers. Who changed what, when, and why is visible. Approvers see only what they're responsible for; sensitive items (like labor) can be limited to the right roles. When it's time to publish, the plan is locked and date-stamped. That's how “final” stays final—and how you answer variance questions without digging in your inbox.

From Spreadsheets to an ITFM Platform

From question to answer (in the room)

The recurring ask from interviews was simple: “I want to ask a question and get an answer before the window closes.” With the plan in one place and rules applied consistently, common what-ifs become safe and quick:

- “Cut 10% without touching critical roles.”
- “Apply the new FX table across impacted lines.”
- “Slip these hires a quarter—what does that do to the forecast?”
- “Renew this contract with a 7% step-up—show me the run-rate change.”

Changes are applied once, lineage is preserved, and the impact is visible across services, cost centers, and the board number. Decisions happen on time because answers arrive on time.

Bottom line:

Moving from spreadsheets to an ITFM platform turns planning from a fragile, file-driven scramble into a single, governed process where intent, evidence, and outcomes all live in one place. Budget owners work in meaningful detail, IT Finance enforces guardrails, FP&A gets a clean, traceable number—and leaders can finally ask “what if?” and get confident answers in the room, not weeks later.

Best-in-Class IT Planning: What “Good” Really Looks Like

THE BAR (hard metrics)

▼ ≤2 days

Monthly close
(business days completed)

▼ ≤2 weeks

Budget duration
(end-to-end annual
budgeting completed)

±3%

Forecast/budget
accuracy
(within variance)

Question →
answer time

(executive questions
answered with lineage)



MINUTES
not weeks

12–18
months



Rolling horizon
(live forecast covering
plus 2+ years of outlook)

CONFESSION FROM SPREADSHEETS ANONYMOUS

“For years, ‘best-in-class’
meant ‘no one cried
during close.’”

Best-in-Class IT Planning: What “Good” Really Looks Like

The cadence

Best-in-class isn't “set and forget.” It's a steady rhythm that keeps plans live and decisions timely.

Plan Annually: one focused window to align investments to strategy and targets. Get in, decide, move on.

Manage Quarterly: formal re-forecast to lock big changes, refresh multi-year views, and re-prioritize the portfolio.

Monitor Monthly: quick forecast touch-ups tied to close; plan vs. actual review with fast variance explanations.

In-room scenario planning: common what-ifs happen safely on the spot in minutes not weeks.

If you do it right, planning is really just a snapshot of your active quarterly forecast that takes just a little more rigor from leadership to review, given the significance of the event and what it communicates to the Office of the CFO and the rest of the enterprise.

The work surface

People plan where work really lives—and Finance still books cleanly.

Owners work in IT terms: business services and capabilities, applications, infrastructure, labor, maintenance, assets.

Finance gets its view: each line is mapped to account and cost center. No matter the requirements from finance, they can be provided.

One number, many views: Finance (GL view), IT leaders (service/app/vendor), and business units (consumption/value) all reconcile to the same published figure.

The evidence

Reviews move quickly because the “why” is at your fingertips.

- Forecast lines are tied to **real items**—POs, invoices, contracts, headcount plans.
- **Changes are auditable** and travel with the data: who changed what, when, and why.
- Variances link straight to **drivers** (renewal escalator, start-date slip, FX change) instead of sending teams to the inbox.

The handoffs

Swim lanes are clear and short.

- **Budget owners** propose adds/removals/timing in their language, own the rationale.
- **IT Finance** applies mappings and rules, runs approvals, publishes and locks.
- **FP&A** consumes the published figure for close and rollup, and partners on scenarios—no side files.
- **Leadership** can now see their planning status in real-time and clearly manager their commitments to the enterprise

Best-in-Class IT Planning: What “Good” Really Looks Like

Bottom line:

Best-in-class IT planning isn't magic—it's measurable. Tight variance ($\pm 3\%$), fast close, a living 12–18 month forecast, and executive questions answered with evidence in minutes are all achievable when there's one published number, clear roles, shared cadence, and line-of-sight from every IT decision to the GL.

Quick diagnostic (are you close?)

Check what's true today:

- We publish **one number** that Finance and IT both use. Yes__ No__
- Exec questions are answered with lineage **inside the meeting**. Yes__ No__
- Our rolling forecast covers **at least 18 months** without a rebuild. Yes__ No__
- Variance explanations use **linked evidence**, not email archaeology. Yes__ No__
- Our annual budget wraps in **two weeks or less**. Yes__ No__
- Owners work in **IT terms**; Finance books **without rework**. Yes__ No__

=SUM

4–6 true: You're near best-in-class—tighten cadence and evidence.

2–3 true: Solid base—focus on lineage, rolling coverage, in-room what-ifs.

0–1 true: You're running planning by spreadsheet—prioritize a governed platform and a single published figure.

Build-to-Run for AI

Every project creates a “run tail”—the OpEx to keep it alive (licenses, cloud/GPUs, support, people). AI makes this riskier: beyond build costs, you'll carry inference/serving, model retraining, data pipelines, observability, security/compliance, and vendor/API fees. Budget the tail from day one by attaching a run profile to each AI initiative: fully loaded labor (MLOps, data, app), effective-dated contracts and escalators, usage tiers, and FX. Map it to account/cost center, publish/lock, and carry it into rolling forecasts. If build and run travel together, approvals stay defensible—and you avoid launching AI that quietly creates unfunded operations.

**CONFESSION
FROM SPREADSHEETS
ANONYMOUS**

“We’ve been stuck at
Step 0: ‘Complain about
spreadsheets, change
nothing.’”



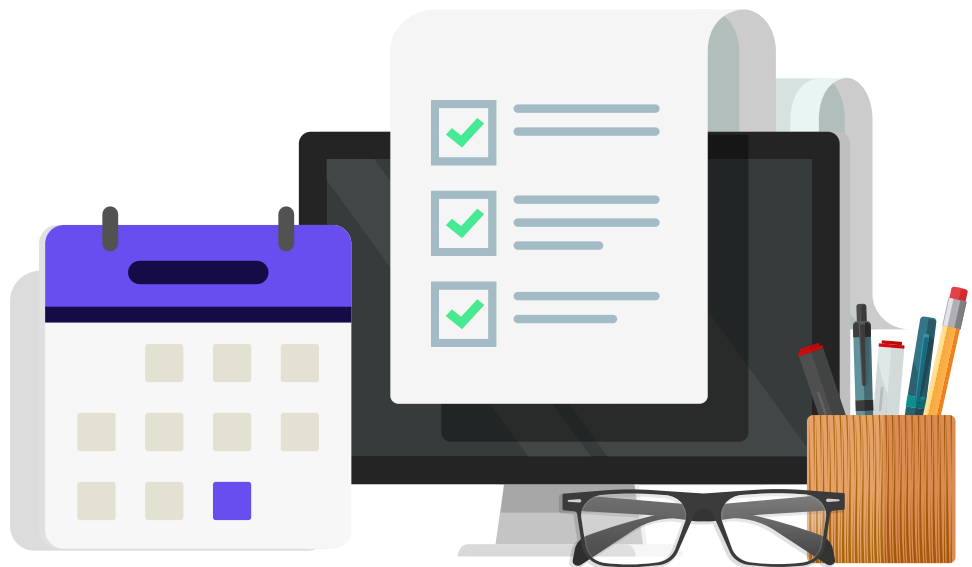
Your Checklist for Moving off Spreadsheets (a practical, vendor-led path)

Your Checklist for Moving off Spreadsheets (a practical, vendor-led path)

- ✓ **Engage a partner:** Line up discovery sessions with an ITFM vendor, such as Nicus, to confirm fit, surface risks, and align on outcomes. Ask for a light “future-state” playback using your language (services, apps, labor, contracts), not theirs.
- ✓ **Align sponsors and goals:** Secure CIO/CFO sponsorship and agree on 2–3 measurable targets (e.g., ≤2-week budget window, ±3% forecast accuracy, exec Q&A in hours). These become the yardstick for decisions.
- ✓ **Build the business case:** Quantify labor hours in the current cycle, the cost of decision latency, error risk, and opportunities unlocked by better forecasting. Balance against software/implementation/change costs to show time-to-value. TIP: Companies like Nicus can help you do this.
- ✓ **Define mission-critical use cases:** Keep it tight: headcount changes, renewals with escalators, cloud right-sizing, and variance explained with evidence. Use these to drive demos, scope, and timelines—not a giant requirements spreadsheet.
- ✓ **Shortlist and validate:** Run a two-phase funnel: broad scan → 2 finalists. Ask each to show your use cases end-to-end: owner intake → approvals → GL-ready outputs → publish/lock → FP&A consumption.
- ✓ **Choose your operating model:** Decide “software + internal team” vs. “managed service (ITFM as a Service)” for speed and staffing realities. Pick the model that gets you live fastest without creating a new hiring problem.
- ✓ **Plan the cutover (don’t boil the ocean):** Pick a first slice (e.g., a portion of the IT organization or one account category), stand up intake/approvals, load recent actuals, and publish one GL-ready forecast. Run parallel for a short period, then lock and expand.
- ✓ **Set governance and access:** Replace email approvals with in-platform workflow. Define who can edit/approve what, capture “who/what/when/why” on every change, and publish a calendar so “final” actually stays final.
- ✓ **Ready the data (right-sized):** Confirm sources (HR, POs/contracts, ERP actuals, cloud usage), mappings (account/cost center), and reference tables (grades/benefits, FX, standard lead times). Keep scope narrow; depth beats breadth at go-live.
- ✓ **Train for the work people actually do:** Give owners a 60-minute hands-on: add a hire, renew a contract, shift timing, leave a note. Give approvers a five-step review guide. Offer office hours the first month; keep artifacts short and practical.

Your Checklist for Moving off Spreadsheets (a practical, vendor-led path)

- ✓ **Measure and iterate:** Track question → answer time, variance-explain time, forecast accuracy trend, and % of plan lines with evidence attached. Fix issues once at the source, not every cycle in a spreadsheet.
- ✓ **Retire the side files:** Freeze legacy sheets as reference, communicate the publish/lock rhythm, and redirect all approvals and changes to the platform. One published number; many views—no shadow copies.
- ✓ Publish your first locked forecast, archive the side files, and tell the team: “We’re recovered.”
- ✓ Graduate from Spreadsheets
Anonymous



**CONFESSION
FROM SPREADSHEETS
ANONYMOUS**

“We said ‘it’s about risk and control’ mostly because we hadn’t done the math.”



The Business Case (No Hand-Waving)

The Business Case (No Hand-Waving)

Like any investment, you need clarity on the outcomes you're targeting. It also helps to see how other organizations have benefited from moving IT planning out of spreadsheets and into an ITFM platform. Here are three examples of achievable business outcomes.

Example 1 — Labor time back, immediately

An organization was spending **\$2M/year** in labor on budgeting and forecasting. By streamlining the process in an ITFM platform, they cut **~80%** of that cost in year one—roughly **\$1.6M** saved—by eliminating manual consolidation, email approvals, and version sprawl.

Example 2 — Decisions made on accurate numbers

Another organization discovered their planning data was off by **more than 35%**. Imagine they were spending **\$5B** on IT—that's **\$1.85B** being inaccurately represented in decision discussions. With governed planning and clear lineage, leadership shifted from blunt cuts to targeted actions because they finally trusted the number.

Example 3 — Capital redeployed instead of blunt cuts

A third organization used platform-driven forecasting to surface **\$300M+** in capital tied up by inaccurate projections. Instead of across-the-board reductions, they returned that capital to the corporate pool and focused cuts where they wouldn't harm critical initiatives.



The Business Case (No Hand-Waving)

The Four Levers of Value

1. Labor hours back (planning + forecast cycles)

What changes: No more managing and consolidating spreadsheets, less time on data management, no reply-all approvals, faster variance explanations (with evidence), one publish/lock.

How to quantify:

$$\text{Labor_Savings} = \text{Participants} \times \text{Hours_Saved_per_Cycle} \times \text{Cycles/Year} \times \text{Loaded_}\$/\text{Hour}$$

Tip: Capture hours for IT Finance, FP&A, and budget owners separately; use a conservative hours-saved estimate.

2. Decision latency avoided (decisions made on time)

What changes: Exec Q → A in minutes/hours; stakeholder-specific reporting, consolidated dollars, in-room what-ifs (cuts with guardrails, FX, hiring shifts, renewals).

How to quantify: Pick 2–3 decisions/year that were late or blunt; estimate the value of acting on time.

$$\text{Decision_Value} = \sum (\text{Benefit_per_Action})$$

Examples: right-sizing cloud, renegotiating a renewal, deferring a lower-value initiative.

3. Accuracy & rework reduction (fewer errors, fewer rewrites)

What changes: Effective-dated assumptions, single published figure, clear lineage, variance-ready detail. While not included below, the reputational damage of mistakes should not be ignored.

How to quantify:

$$\text{Rework_Savings} = \text{Hours_of_Rework} \times \text{Loaded_}\$/\text{Hour}$$

$$\text{Error_Avoidance} = \text{Error_Events} \times \text{Avg_}\$/\text{Impact}$$

$$\text{Accuracy_Benefit} = \text{Rework_Savings} + \text{Error_Avoidance}$$

4. Working capital & cash timing (finance benefit)

What changes: Renewals/POs mapped to periods; fewer late surprises; cleaner accruals; discount capture.

How to quantify: Finance can size expected improvements in early-payment discounts, accrual accuracy, and payment timing.

$$\text{Cash_Timing_Benefit} = \text{Discounts_Captured} + \text{Accrual_Accuracy_Benefit} + \text{Timing_Gain}$$

The Business Case (No Hand-Waving)

Roll-up & payback

Fill in the four lever amounts.

You only need three numbers to tell the story: Annual Benefit, Payback, ROI.

Your Annual Benefit

= Labor + Decision + Accuracy + Cash timing → \$_____

Your Payback

= Year-1 costs ÷ (Annual benefit ÷ 12) → __ months

Your Year-1 ROI

= (Annual benefit – Year-1 costs) ÷ Year-1 costs → __%

Typically, organizations implementing an IT Financial Management solution like Nicus for planning, see a 2-5% savings in the cost footprint of IT.

Bottom line:

Moving IT planning into an ITFM platform isn't just a process upgrade—it's a value engine. Organizations are freeing millions in labor, basing decisions on accurate numbers, and redeploying trapped capital to higher-value initiatives. When you quantify labor savings, faster decisions, fewer errors, and better cash timing, the annual benefit, payback, and ROI become clear—and often compelling in year one.

**CONFESSION
FROM SPREADSHEETS
ANONYMOUS**

“These are the things
we say in the meeting
when we’re not quite
ready to change.”



Objections, Answered

Objections, Answered

“We already plan in the corporate tool.”

Keep it. ITFM doesn't replace enterprise planning; it fills the IT detail gap so FP&A gets GL-ready numbers without chasing side files.

“Excel is faster.”

Fast to type, slow to reconcile. FP&A needs repeatable lineage, effective dates, and auditability. That's where spreadsheets break down.

“Won't this create two sources of truth?”

No. The published, locked figure is the source of truth. ITFM produces it with clear mapping to the general ledger; the corporate tool consumes it for rollup.

“We'll lose control of the numbers.”

You gain it. Ownership, approvals, and change notes live with the data. Who changed what, when, and why is obvious—and reversible if needed.

“Integration will be a headache.”

Start small. HR (headcount/grades), procurement/POs, ERP actuals. Prove value on a slice, then add feeds. Meanwhile, spreadsheet handoffs are the real integration problem today.

“This overlaps FP&A's job.”

It supports it. IT enters intent at operational detail; ITFM applies FP&A's rules (accounts, cost centers, effective dates, fully loaded amounts) and outputs bookable figures.

“Security and access?”

Role-based access by audience (Finance, IT, budget owners). Budget holders see their view; Finance sees all views. No more emailing sensitive files.

Objections, Answered

“Data quality isn’t great—won’t a tool just expose that?”

Yes, and that’s the point. You fix issues once, at the source, instead of re-fixing them every cycle in spreadsheets.

“Show me the ROI.”

Shorter close/forecast cycles, fewer reworks, faster variance explanations, and fewer blunt cuts. Many teams measure savings in labor hours and avoided misses (vendor renewals, hiring slips).

“Timing—budget season is already underway.”

Don’t boil the ocean. Pick a contained scope (e.g., top services or a major application portfolio), stand up the flow, and feed results into the current cycle. Expand after.

“Will IT bypass FP&A?”

No. FP&A defines the mappings and approves what gets published. ITFM makes the handoff cleaner; it doesn’t change who owns the ledger.

“We can do this with a custom build in our planning tool.”

Maybe for one use case. IT’s footprint changes constantly (cloud, renewals, hiring, allocations). Purpose-built ITFM handles that variety without a maintenance project every quarter.

If any of these sound like something you’ve said... congratulations, you’re among friends. The whole point of Spreadsheets Anonymous is that you don’t stay stuck there.

Wrap Up

Welcome to the last meeting of Spreadsheets Anonymous.

You've seen the signs, scored your organization, walked through what "good" really looks like, and proven there's real money—and real risk—tied up in spreadsheet-driven planning. At this point, "we'll fix it next budget season" is just another confession.

The way out is clear: move IT budgeting and forecasting into an ITFM platform and keep spreadsheets in their sweet spot as a flexible, personal workbench. Insist on one published, locked number that IT, Finance and business leaders all trust. Start small if you need to, but start: pick a scope, define your success metrics, and partner with an ITFM provider like Nicus. Graduate from reconciling in the shadows to making confident, timely decisions in the room. Your next "final" can be the one that actually sticks.

A photograph of a meeting room. On the wall, a framed sign reads "YOU ARE NOT ALONE" in bold, black, sans-serif capital letters. Below the sign is a small wooden table with a black metal frame. On the table are several water bottles, three blue mugs, and a black coffee maker. In the foreground, several black folding chairs are arranged in a circle. The room has light-colored walls and a wooden floor.

YOU ARE
NOT
ALONE

Glossary

Account (GL Account)

The general ledger category that classifies a transaction (e.g., software, labor, depreciation).

Accruals

Recording expenses in the period they're incurred, regardless of cash payment; used to reconcile plan/forecast to general ledger actuals.

Actuals Mapping

Linking imported GL actuals to the corresponding planned or forecast line items so reports and variances align.

Allocation / Chargeback / Showback

Ways to distribute shared IT costs to consumers (business units, departments, products etc.). Showback = report only; chargeback = journalized cost.

Baseline

The frozen starting point (plan or snapshot) you measure changes against during the cycle.

Build-to-Run (Run Tail)

The ongoing operating costs that follow a project go-live (licenses, hosting, support, staff).

CapEx (Capital Expenditure)

Spend on long-lived assets (e.g., equipment, software build) that is capitalized and depreciated over time.

Capitalize vs. Expense

Accounting treatment: capitalize long-lived investments (depreciate over time) vs. expense in-period.

Cost Center

An organizational unit used to track and control costs; commonly drives security, reporting, and planning ownership.

Crosswalk (GL Mapping)

The documented mapping from IT views (service/app/vendor) to Finance's accounts and cost centers.

Dashboard

A page of visualizations/tables designed for quick review of plan vs. actuals, variances, and KPIs.

Effective Dating

Attaching start/stop/effective dates to changes (merit, FX, renewals) so timing flows correctly into periods.

CONFESSIO FROM SPREADSHEETS ANONYMOUS

“We finally wrote the glossary so we'd all stop pretending we agreed on the jargon.”

Glossary

Escalator / Renewal Increase

The percentage step-up applied at renewal or per interval (e.g., +7% annually).

Evidence (Source Documents)

Linked proof supporting a line item—POs, invoices, contracts, headcount approvals—used in reviews and audits.

FP&A (Financial Planning & Analysis)

Finance team that owns forecasting, budgeting cadence, management reporting, and targets.

Forecast

The forward-looking portion of the plan from the current period onward (often shown alongside year-to-date actuals).

Forecast Accuracy

How close forecasts land to actuals, often reported as $\pm\%$ over a period.

Fully Loaded Cost

Base pay (or vendor rate) plus fringe/benefits, taxes, and other additions used for planning.

FX (Foreign Exchange) Rate

Currency conversion rate applied to multi-currency plans and actuals; often effective-dated.

Governance

The guardrails around planning: ownership, approvals, audit trail, and a publish/lock process.

Increment

A rule that defines how an amount spreads over time (e.g., evenly over 12 months, one-time in March).

Interval

The frequency at which a line is recognized or renewed (monthly, quarterly, annually, one-time).

KPI (Key Performance Indicator)

A metric used to measure performance against objectives (e.g., forecast accuracy, time to close).

Labor Line Item

A planned cost tied to a person/role (FTE or contractor), including start date, grade/band, and fully loaded cost.

Ledger (General Ledger / GL)

The system of record for financial transactions; the “bookable” view FP&A must reconcile to.

Lineage

The traceable path from a reported number back to its sources and assumptions (who/what/when/why).

Glossary

Live View

A reporting view that combines actuals for completed periods with the current forecast for future periods.

Merit (Compensation Increase)

Planned compensation adjustments effective on specific dates; often modeled as % increases.

Non-Labor Detail

Planned costs for vendors, software, cloud, hardware, maintenance, and services (anything not labor).

Ops (Operating Expenses / OpEx)

Day-to-day operating costs recognized in the period incurred; separate from cash timing and CapEx.

Plan / Scenario

A collection of plan lines that represents a working version (baseline, scenario A/B, approved budget). Scenarios can remain unpublished for what-ifs.

Project

A time-bound initiative (build/change) with budget, milestones, and a run tail that impacts future OpEx.

Publish / Lock

Marking a plan version as final for a period; used as the single source for Finance and IT.

Rollup

Summarizing lower-level data to higher levels in a hierarchy (e.g., service → portfolio → division).

Rolling Forecast

A continuously updated view (typically 12–18 months forward) that moves as time passes.

Role-Based Access

Controlling who can see, edit, or approve which data (e.g., by cost center, audience, or field).

Service (Business Service)

An IT-delivered capability (e.g., CRM, collaboration) that bundles apps, infrastructure, and labor.

Shadow Accounting

Parallel files or off-system reconciliations maintained outside the governed process.

Single Source of Truth

The published, locked figure everyone uses, with consistent mappings and lineage.

Snapshot

A dated, read-only capture of a plan or forecast used for audit, comparison, and reporting.

Variance

Difference between plan/forecast and actuals (or between two plan versions), typically shown as amount and %.

Variance Commentary

Plain-language explanations of variances with references to the drivers (invoice, contract clause, start-date shift).

Version Sprawl

Multiple uncontrolled copies of the “plan” circulating via email or shared folders.

What-If / In-Room Scenario Planning

Rapid, safe changes during review (e.g., protect roles, apply FX, model a renewal step-up) with immediate impact shown.

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Solution