

Technology Fit Worksheet

Factor	Excel (Traditional)	Generative AI	Agentic AI
Ease of Use	Manual formulas	Natural language queries	Autonomous workflows
Collaboration	Shared files	AI-assisted outputs	AI-driven coordination
Cost	Licenses	Subscription compute	Dynamic resource allocation
Customization	Manual macros	Fine-tuning prompts	System-level agents
Risk Profile	Low-tech but error-prone	Hallucinations	Autonomy & alignment risks
Transparency	Clear formulas	Opaque outputs	Explainable workflows (if logged)
Speed & Scale	Limited to user input	Rapid generation	Continuous agentic action
Best Use Cases	Accounting / finance	Creative drafts	Complex multi-step projects

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How to Use This Worksheet

Use the guiding questions below to reflect on which tool best fits your workflows. Each section highlights considerations to help you determine whether Excel, Generative AI, or Agentic AI is most aligned with your needs.

Ease of Use

- *Do you prefer structured formulas or conversational inputs?*
- *Would autonomous task execution save you significant time?*

Collaboration

- *Is your team's work mostly file-based, or do you need real-time AI-driven coordination?*
- *How important is AI-generated assistance for group workflows?*

Cost

- *Is a fixed license cost more predictable than variable cloud usage?*
- *Could dynamic AI scaling reduce or increase your expenses?*

Customization

- *Do you rely on custom macros and formulas, or would adaptive AI agents fit better?*
- *Would prompt-based customization be enough, or do you need system-level control?*

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Risk Profile

- *Is human error in spreadsheets a bigger risk than AI hallucinations or alignment drift?*
- *Do you have governance systems in place to handle autonomy risks?*

Transparency

- *Do you need every calculation to be explicitly visible?*
- *Would you accept opaque AI outputs if explainability logs are available?*

Speed & Scale

- *Are your workflows limited by human input speed?*
- *Would continuous autonomous workflows deliver greater scale benefits?*

Best Use Cases

- *Are you focused on traditional finance/accounting?*
- *Do you need creative generation or multi-step automated execution?*

Next Steps

After reflecting on your answers, take these practical steps to move forward:

- Summarize key insights across all factors
- Decide which tool (Excel, GenAI, Agentic AI) best aligns with your goals
- Share your findings with your team for discussion
- Identify one pilot project to test your chosen approach
- Revisit this worksheet after the pilot to refine your strategy