

FREE INDEPENDENT WORKSHEET

The 15-Minute Software Stack Audit

Find the one tool problem worth fixing next - before buying anything else.

A good stack is not the one with the most features. It is the smallest set of tools that gives every important record one clear home and removes a real business bottleneck.

ONE RECORD. ONE HOME. ONE OWNER.

START HERE

Your business snapshot

Business / name

Date

Main service or offer

Team size

CHOOSE ONE STARTING POINT

Which symptom is costing you the most time, money or confidence today?

☐ Leads are scattered or follow-up is unreliable

☐ Audience or email activity lacks a clear system

☐ Projects are difficult to see, hand over or prioritise

☐ Invoices, expenses or cash visibility feel fragile

STEP 1 - MAP THE WORK

Does each stage have one clear system?

Tick what is true today. Score confidence from 0 (unclear or manual) to 3 (reliable and owned).

1 Audience

Capture permission and communicate consistently.

- ☐ New contacts enter one clean list
- ☐ Consent and unsubscribe are handled
- ☐ A simple follow-up sequence exists

Current system / tool

CONFIDENCE

0

1

2

3

2 Sales

Know who needs a follow-up and what happens next.

- ☐ Every opportunity has a next action
- ☐ Notes and contact history stay together
- ☐ A named person owns follow-up

Current system / tool

CONFIDENCE

0

1

2

3

3 Delivery

Turn sold work into visible, repeatable delivery.

- ☐ Projects have one source of truth
- ☐ Owners and deadlines are visible
- ☐ Handoffs do not depend on memory

Current system / tool

CONFIDENCE

0

1

2

3

4 Finance

See invoices, expenses and cash position clearly.

- ☐ Invoices and expenses are current
- ☐ Records are ready for your accountant
- ☐ Cash due in is easy to see

Current system / tool

CONFIDENCE

0

1

2

3

YOUR LOWEST SCORE IS THE FIRST PLACE TO INVESTIGATE.

Do not replace software yet. First confirm whether the problem is the tool, the setup or the habit around it.

STEP 2 - REMOVE FRICTION

Find overlap before adding another tool

- | | | |
|--|---------------------------|--------------------------|
| ☐ Two tools store the same customer, task or financial record | YES ☐ | NO ☐ |
| ☐ Important information must be copied manually between systems | YES ☐ | NO ☐ |
| ☐ A paid subscription has not supported real work in the last 30 days | YES ☐ | NO ☐ |
| ☐ Nobody clearly owns the setup, data quality or monthly review | YES ☐ | NO ☐ |
| ☐ You cannot explain the annual cost or export your data confidently | YES ☐ | NO ☐ |

STEP 3 - MAKE ONE DECISION

Your 30-day action

The single bottleneck we will fix

Owner

Review date

CHOOSE THE SMALLEST USEFUL MOVE

KEEP

The system works; document its owner and purpose.

SIMPLIFY

Remove duplicate fields, steps or automations.

TEST

Run one real workflow before committing or migrating.

REMOVE

Cancel only after exporting data and confirming dependencies.