Tech Stack Assessment Checklist

A self-audit for honestly evaluating where your tech stack is helping you, and where it is quietly costing you.

Most tech stack problems are not technology problems. They are design problems that nobody has stopped to diagnose. This checklist is the same diagnostic we run at the start of every consulting engagement. Work through it honestly, take notes in the right column, and the picture of where you stand will be clearer than any sales pitch.

The four friction questions

Start here. Before any checklist, before any tool evaluation, walk the floor and answer these four questions. Your inefficiencies are your roadmap.

#	Ask your team	What the answer tells you
1	Where are you re-entering data from one system into another?	Double entry means integration is missing. Every duplicate keystroke is a dollar of overhead and a chance to introduce errors.
2	Where do approvals stall, and where do they live?	If approvals live in email or chat threads, they are invisible and untrackable. You cannot manage what you cannot see.
3	Where is email functioning as the system?	Email is not a workflow tool. Critical steps that depend on inboxes get lost or forgotten. The work itself should live in the system.
4	Where does leadership lack real-time visibility?	If you cannot see pipeline, revenue, or operational status without asking someone to pull a report, you are flying on stale data.

Stack assessment checklist

Score each item: check the box if the statement is true today. Add notes about specifics, owners, or exceptions in the right column. Tally checked boxes at the end for an overall score.

	Statement	Notes
Financial system (your ERP)		
☐	We have one financial system of record. Not two, not three.	
☐	Every revenue and expense transaction flows through this system, not around it.	
☐	Month-end close does not require reconciling between two ledgers.	

	Statement	Notes
☐	Our chart of accounts and reporting structure was designed for how we operate today, not how we operated five years ago.	
☐	Financial reports are generated from the system, not rebuilt in Excel each month.	
Client and pipeline system (your CRM)		
☐	We have one client system of record. Sales, account management, and service all use it.	
☐	New opportunities flow from CRM into ERP automatically when they close. No manual recreation.	
☐	Engagement information, contact details, and billing terms are visible to anyone who needs them, in one place.	
☐	Pipeline reports come from the CRM in real time, not from a spreadsheet a sales leader maintains.	
Workflow automation		
☐	Approvals (expense, time, purchase, contract) happen inside a system with an audit trail. Not in email.	
☐	Handoffs between teams (sales to delivery, delivery to billing) trigger automatically. No one has to remember to send the email.	
☐	Notifications go to the right person, at the right time, in the channel they actually check.	
☐	New employee onboarding, client onboarding, and vendor onboarding all follow a defined workflow that anyone can run.	
Reporting and decision-making		
☐	Leadership dashboards pull live data, not last month's data.	
☐	KPIs are defined the same way across departments. Revenue means the same thing to sales and to finance.	
☐	Critical reports do not depend on one person being available to run them.	
☐	When the data on a dashboard looks wrong, we can trace it back to the source transaction in minutes, not days.	
Adoption and habits		
☐	Our team's default first move for a task is the system, not a spreadsheet or an email.	

	Statement	Notes
☐	Leadership uses the systems daily. The behavior we want from the team is modeled at the top.	
☐	New hires are productive in the system within their first two weeks.	
☐	We have role-based training, not blanket training. People learn what they will actually do.	
☐	Subscription costs are reviewed annually and unused tools are retired without sentiment.	

How to score yourself

Count the boxes you checked. Out of roughly 25 items, here is what each range tells you.

Boxes checked	Verdict	What to do
20+	**Tuned**	Your stack is in good shape. Focus on continuous improvement, retiring tools that no longer earn their seat, and layering on Copilot and AI capabilities now that the foundation is solid.
14 to 19	**Functional**	You have the bones of a working stack but real friction in two or three areas. Pick the two lowest-scoring sections and treat them as your next 90-day projects. Do not start over.
8 to 13	**Fragmented**	You are running on workarounds. Map your workflows before buying anything new. Your roadmap is in the friction questions on page 1. The instinct to buy another tool will make this worse.
Under 8	**Foundational rebuild**	This is not a tooling problem, it is an architecture problem. Step back, define the workflows you need to support, and rebuild the stack against those workflows in phases. Quick wins fund the next phase. Do not try to fix everything at once.

Your next three moves

Based on the lowest-scoring section above, what are your next three concrete actions? Be specific. “Fix reporting” is not an action. “Define the source of truth for monthly revenue by service line and rebuild that one dashboard” is an action.

#	Action	Owner	Target date
1			
2			
3			