Tech Stack Audit Checklist

Find the Gaps, Overlaps, and Automation Opportunities in Your Current Tools

By KernTech — Workflow Automation for Small Businesses

Instructions

List every tool your business uses. Then score each one. The goal: find what's costing you money, what's not connected, and where automation will have the biggest impact.

Step 1: Map Your Current Stack

Fill in every tool your team uses daily or weekly:

Category	Tool Name	Monthly Cost	# of Users	Cloud or Desktop?
Email & Calendar		$ ___	___	
CRM / Client Management		$ ___	___	
Core Operations *(practice mgmt, PSA, AMS)*		$ ___	___	
Accounting / Billing		$ ___	___	
Document Storage		$ ___	___	
Communication *(Slack, Teams, etc.)*		$ ___	___	
Project / Task Management		$ ___	___	
Marketing / Website		$ ___	___	
Other: ____________		$ ___	___	
Other: ____________		$ ___	___	
TOTAL MONTHLY SPEND		**$** ___		

Step 2: Integration Health Check

For each pair of tools that *should* talk to each other, check the status:

Connection	Status
CRM → Email (contacts sync automatically?)	✅ Connected / ❌ Manual / ⚠️ Partial
Intake forms → CRM (new clients auto-created?)	✅ / ❌ / ⚠️
CRM → Billing (client info flows to invoices?)	✅ / ❌ / ⚠️
Email → Task management (emails become tasks?)	✅ / ❌ / ⚠️
Document storage → Core system (files linked to clients?)	✅ / ❌ / ⚠️
Calendar → CRM (meetings logged automatically?)	✅ / ❌ / ⚠️

Count your ❌ and ⚠️ marks: _____ (Each one = data you're moving by hand)

Step 3: Redundancy Check

Do any of your tools overlap? Common duplicates:

Overlap	Check
Two places for storing client documents (e.g., email + Drive + system)	☐
Two task/project tools (e.g., Outlook tasks + Asana)	☐
CRM features you're paying for but using a spreadsheet instead	☐
Multiple communication channels for the same team (email + Slack + Teams)	☐
Paying for software nobody on the team actually uses	☐

Each checked box = money or time you can recover.

Step 4: Automation Readiness Score

Rate each tool (1 = No, 3 = Yes):

Question	Score (1–3)
Does it have an API or Zapier/Make integration?	___
Is it cloud-based (accessible from anywhere)?	___
Can it send automated notifications/emails?	___
Does it support custom fields or workflows?	___
Is the data exportable (CSV, API, reports)?	___
Average Score	___

Average	What It Means
2.5–3.0	Your stack is automation-ready. Focus on connecting the gaps from Step 2.
1.5–2.4	Partially ready. You may need to swap 1–2 tools before automating.
1.0–1.4	Your tools are holding you back. Consider modernizing your core system first.

Step 5: Your Top 3 Action Items

Based on your audit, write down the three highest-impact changes:

Priority	Action	Expected Impact
1	____	___ hrs/wk saved
2	____	___ hrs/wk saved
3	____	___ hrs/wk saved

Common Quick Wins by Vertical

Accounting Firms: Connect document collection to practice management (eliminate email ping-pong during tax season)

MSPs: Connect PSA → billing → client portal (eliminate double-entry on tickets and invoices)

Insurance Agencies: Connect AMS → email → renewal calendar (eliminate manual renewal tracking in spreadsheets)

Want Help Connecting the Dots?

We'll review your stack, identify the 3 highest-ROI integrations, and map out the implementation — free, in 30 minutes.

Book your workflow audit: cal.com/alan-kerntech/30min

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