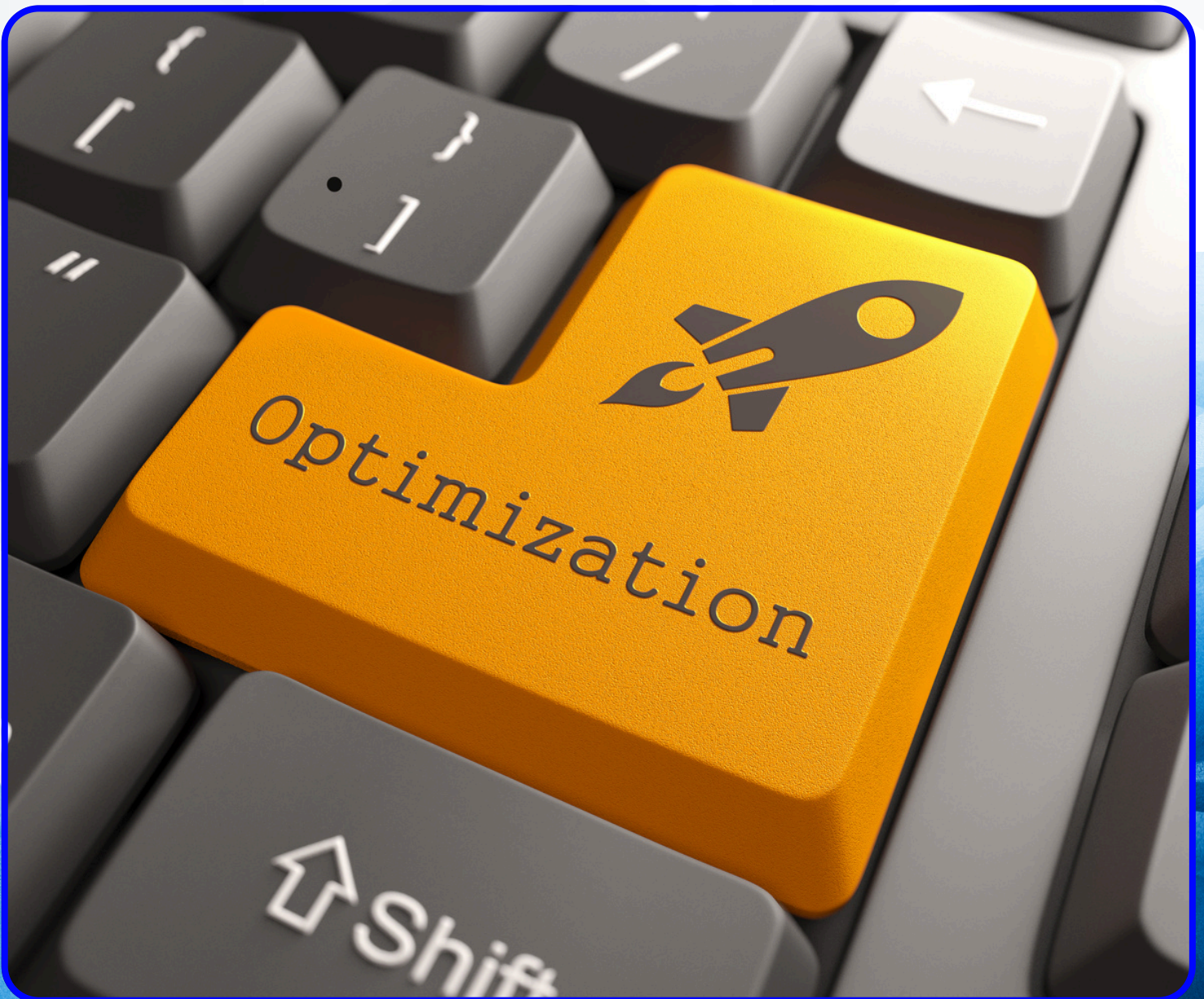


PM PLATFORM AUDIT & OPTIMIZATION KIT



1. HOW YOUR TEAM ACTUALLY WORKS

Describe your typical task/project flow:

- Who creates new tasks? _____
- Who assigns them? _____
- How do updates get made? _____
- How do you know when something is done? _____



2. PLATFORM CHECK-UP

Rate your current PM tool (1–5):

Element	Score (1–5)	Notes
Team uses it consistently		
Tasks are updated in real-time		
Statuses are clear & meaningful		
Project visibility is simple		
Onboarding new users is easy		



3. FRICTION FINDER

Where is your team getting stuck?

- Too many boards?
- Too many tags/statuses?
- No ownership?
- Confusing views?

What's the most common complaint about the tool?



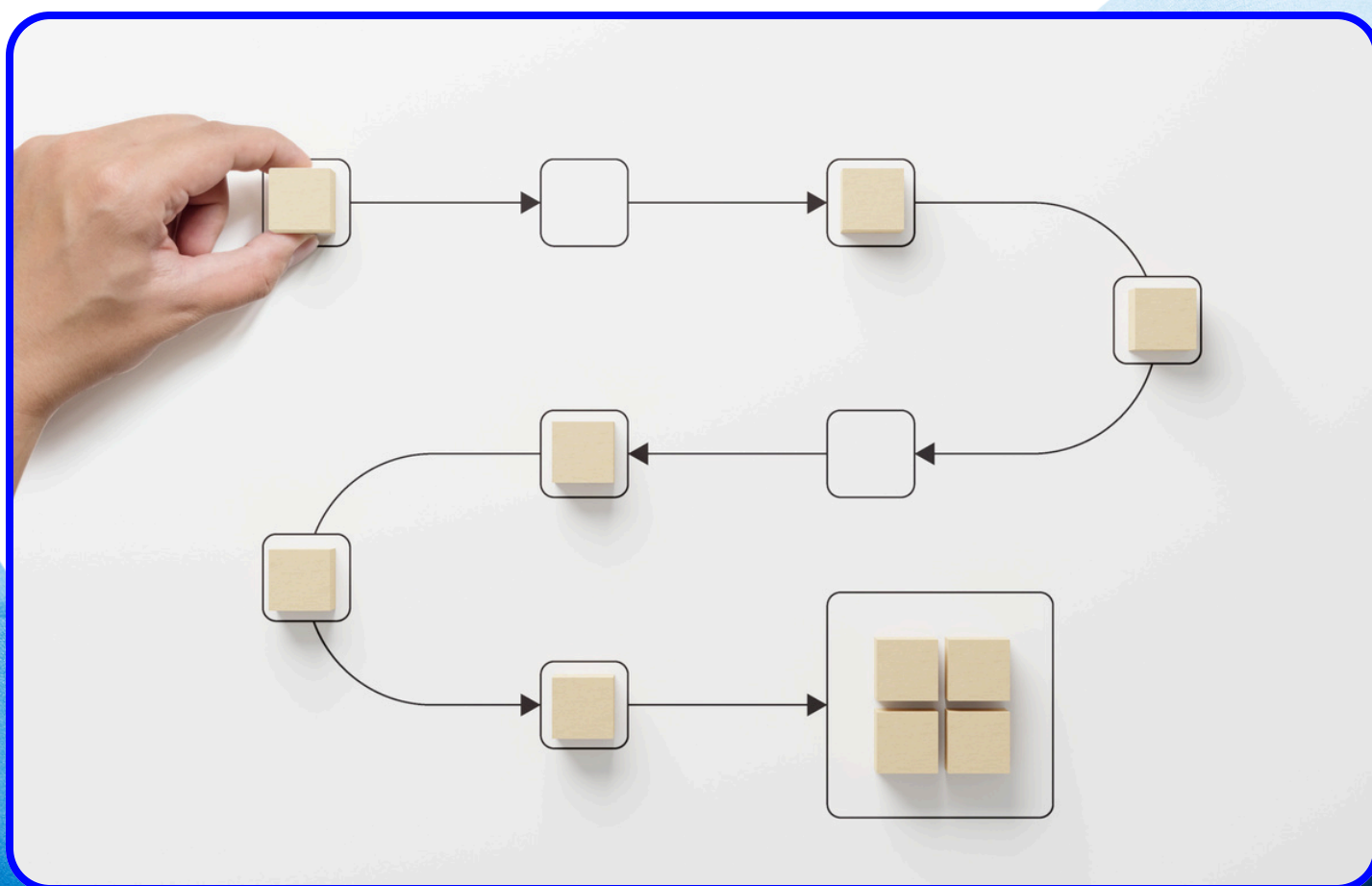
4. STREAMLINE PLAN

Pick 3 actions to improve your PM system:

1. _____

2. _____

3. _____



5. TOOLS WE RECOMMEND

- DevStride – scalable, role-based, highly customizable
- ClickUp – flexible for small teams
- Trello – simple & visual for light task tracking
- Notion – good for documentation + PM hybrid

Choose your next step: optimize what you've got or switch to something that fits better.

NOTE: brand isn't important. Fit is important.



SCAN HERE



Schedule a free discovery session with
WOWSuccessTeam

