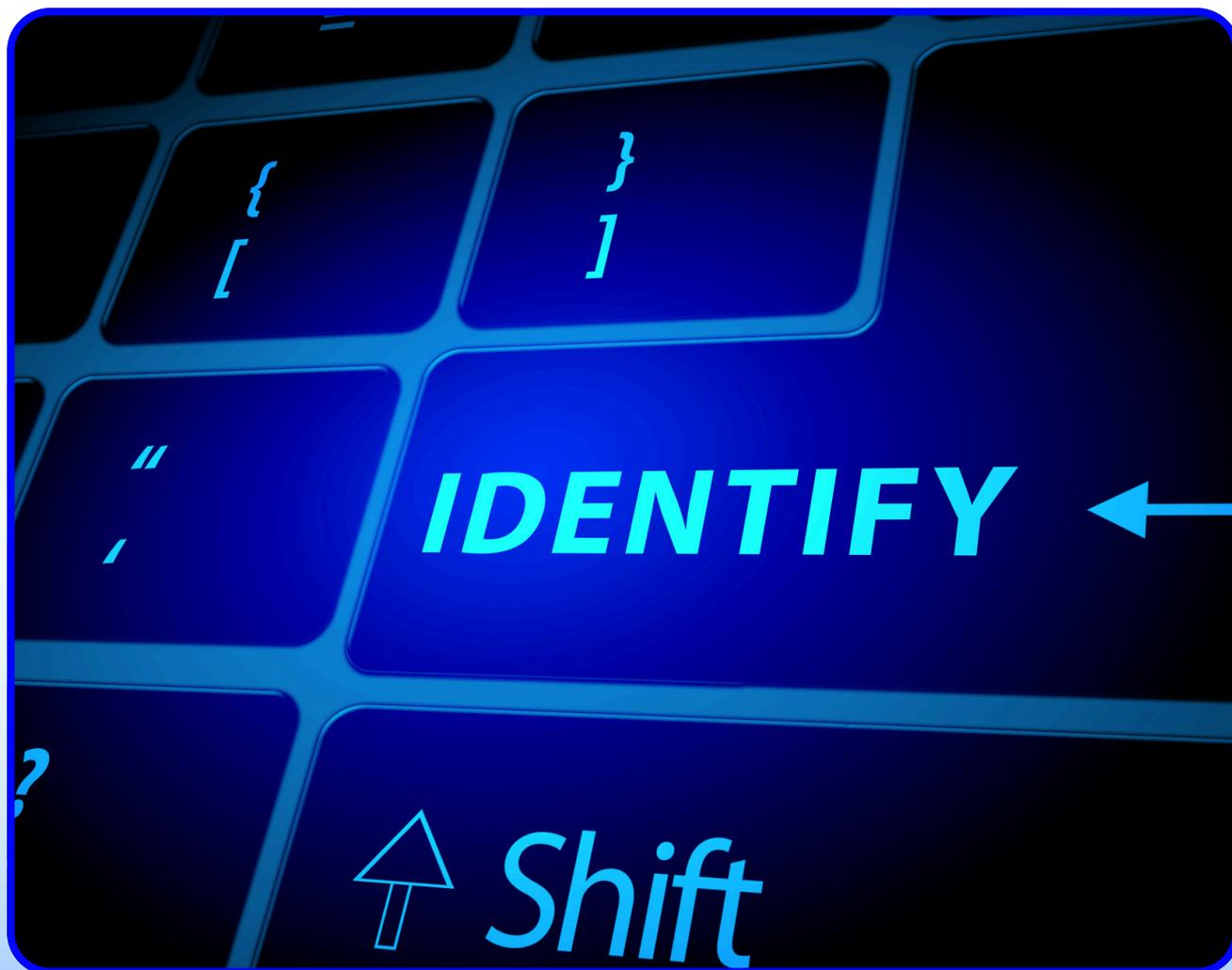


TECH STACK CLARITY WORKSHEET

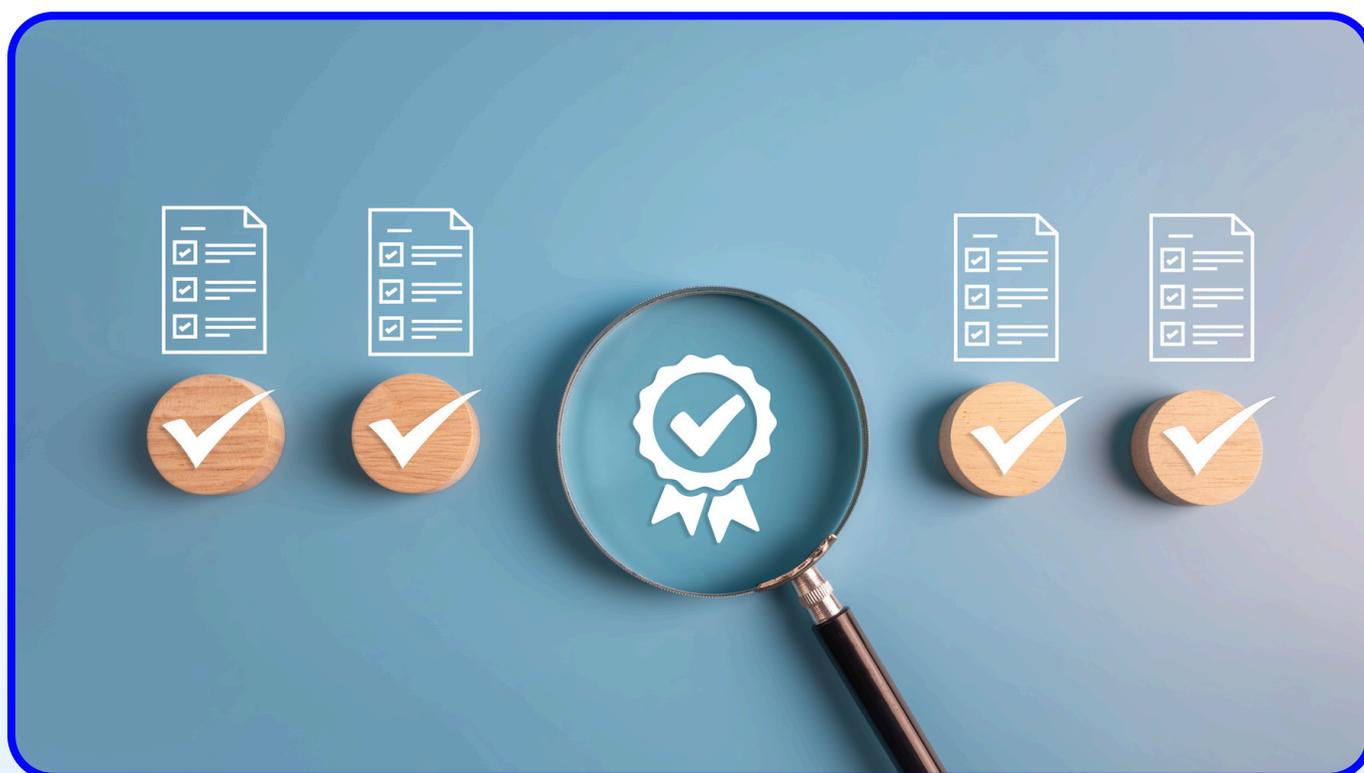
A Practical Tool to Identify Duplication, Friction, and Hidden Cost



INSTRUCTIONS

Complete this worksheet honestly.

There are no “right” answers — only clarity.



1. CURRENT TOOLS

List every system your business uses today.

(Include CRMs, project tools, accounting, scheduling, compliance, dashboards, spreadsheets.)

Tool	Primary Purpose	Who Uses It	Why It Exists



2. DATA OVERLAP

For each of the following, note where it lives:

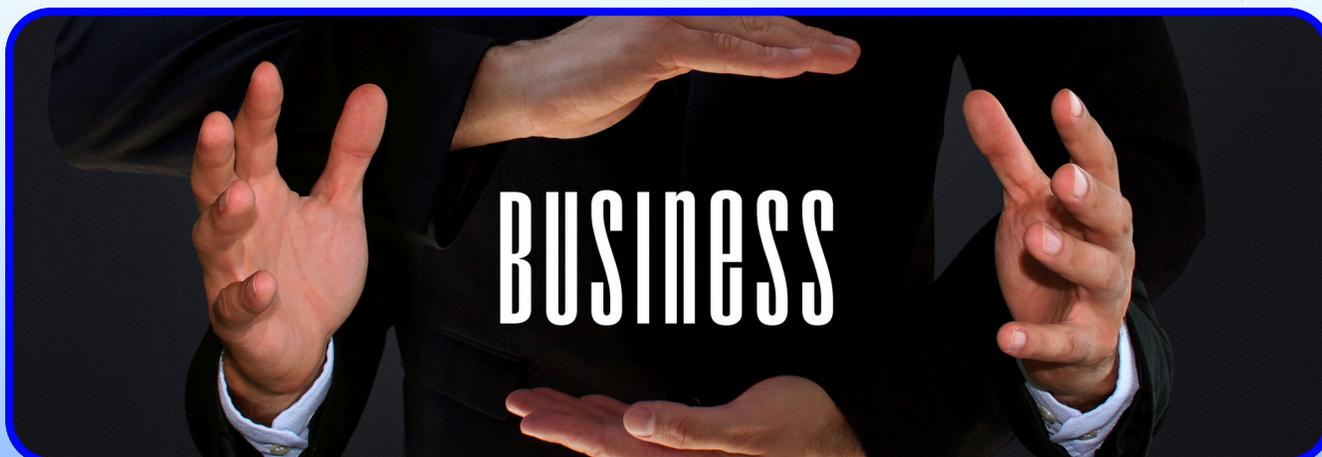
- Customer information _____
- Sales pipeline _____
- Project status _____
- Financial data _____
- Compliance records _____

Questions to answer:

- Does the same data exist in more than one place?

- Which system is supposed to be the source of truth?

- Where does manual re-entry happen?



3. MANUAL WORK & WORKAROUNDS

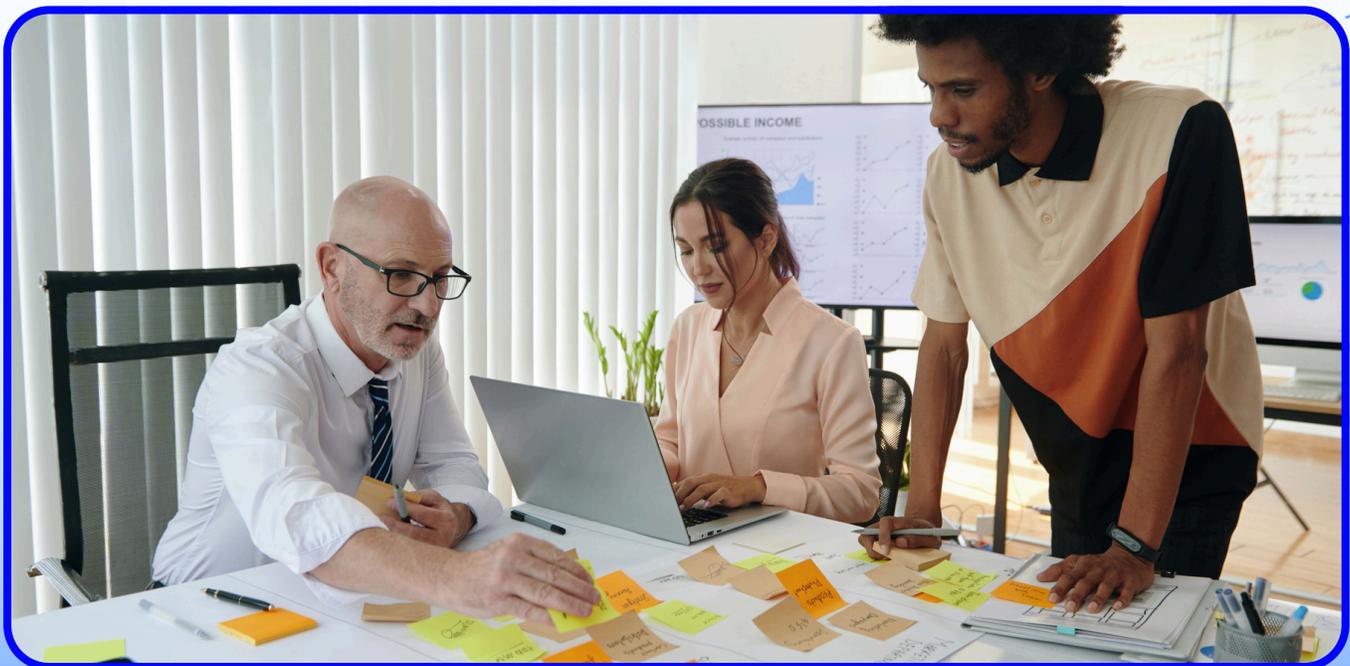
List tasks that require:

- Copy/paste _____
- Exports/imports _____
- Side spreadsheets _____
- “Just double-checking” _____

Ask:

- Why does this step exist?

- What breaks if it's skipped?



4. TOOL CONFIDENCE CHECK

For each system, rate:

- Trust in accuracy (Low / Medium / High)
- Team adoption (Low / Medium / High)
- Value delivered vs effort required



5. DECISION CLARITY

Answer honestly:

- Can I quickly see how the business is performing?

- Do reports match what I feel is happening?

- Do I rely on people instead of systems for answers?



FINAL REFLECTION

Which statement feels most true?

- We need fewer tools
- We need better integration
- We need clearer ownership
- We need system optimization
- We need help stepping back and redesigning



CONCLUSION

If this worksheet raised more questions than answers, that's normal.

Book a CRM Q&A Meeting with us today!

[Schedule a free discovery session with
WOWSuccessTeam](#)

SCAN HERE

