

Technology Stack Audit Template

List every tool your business pays for or depends on, see how well each one is used, and find the overlaps, gaps and renewals worth acting on.

How to use this template

1. **Find everything.** Pull the last 12 months of card statements and invoices, and ask each team what they use. Include free tools, personal accounts used for work and spreadsheets that run something important.
2. **Rate how each tool is used.** Use the scale on page 3. Be honest about tools that were bought for one job and only half adopted.
3. **Look for overlaps and gaps.** Two tools doing the same job cost twice. Work that lives in email, paper or someone's memory is a gap, even when nothing is broken yet.
4. **Check who has access.** Know who holds admin rights to each system and what happens when someone leaves.
5. **Turn it into actions with dates.** Use renewal dates to time your changes, so you aren't paying for a year of something you meant to cancel.

Easy to miss. Email and calendars, accounting, payroll, banking portals, your CRM or customer list, scheduling and booking, file storage, phones and texting, your website, domain and hosting, e-signature, project and task tools, industry software, AI tools, and any spreadsheet the business would struggle without.

This PDF is fillable. Type into the shaded fields and save, or print it and write by hand.

1 Inventory

One row per tool or subscription.

#	TOOL	WHAT IT'S USED FOR	OWNER	USERS	COST PER YEAR	RENEWAL DATE	MONTHLY OR ANNUAL
1							
2							
3							
4							
5							
6							
7							
8							
9							
10							
11							
12							
13							
14							
15							
16							
17							
18							
19							
20							
21							
22							
23							
24							

2 How well each tool is used

Rating scale (0 to 3). 0 = Barely used. 1 = Used, but not as intended or by only some of the people who should. 2 = Used as intended by most people. 3 = Fully used and connected to the tools around it.

Verdict. Keep, Fix (train, configure or connect it), Consolidate (another tool can do this job) or Cut.

#	TOOL	ADOPTION (0-3)	FIT FOR THE JOB (0-3)	CONNECTS TO OTHER TOOLS (0-3)	STILL NEEDED? (Y/ N)	VERDICT
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						
15						
16						
17						
18						
19						
20						
21						
22						
23						
24						

3 Overlaps

Jobs being done by more than one tool, like two places to store files or three ways to message the team.

#	JOB TO BE DONE	TOOLS DOING IT TODAY	KEEP WHICH ONE	WHY
1				
2				
3				
4				
5				
6				

4 Gaps

Work that happens outside your systems: in spreadsheets, inboxes, paper or someone's head.

#	WORK OR INFORMATION	WHERE IT LIVES NOW	WHAT IT COSTS YOU	PRIORITY
1				
2				
3				
4				
5				
6				

5 Access and data

Check each box that's true for your business today.

- ☐ Every business-critical system has at least two people with admin access, and one of them is an owner or senior leader.
- ☐ Accounts are in the business's name, not tied to a personal email address.
- ☐ Multi-factor sign-in is turned on for email, banking, payroll and other critical systems.
- ☐ There's a written list of what to shut off or hand over when someone leaves, and it gets used.
- ☐ Former employees and contractors no longer have access to any system.
- ☐ Shared passwords are kept in a password manager rather than in a document or on sticky notes.
- ☐ You know where customer data is stored and which tools can see it.
- ☐ Important data is backed up, and someone has tested restoring it in the last year.

Where key data lives

#	DATA	MAIN SYSTEM	ALSO COPIED TO	WHO HAS ADMIN ACCESS
1	Customer records			
2	Financials			
3	Employee records			
4	Contracts and documents			
5	Email and calendars			

6 Totals

Number of tools	
Total annual spend	
Tools to cut or consolidate	
Estimated annual savings	
Biggest gap to close	

7 Action plan

Time each action to the tool's renewal date where you can.

#	ACTION	TOOL	OWNER	DUE	SAVINGS OR BENEFIT
1					
2					
3					
4					
5					
6					
7					
8					

Want a second set of eyes?

If your tools have grown faster than your plan for them, we help owners sort out what to keep, connect what's left and get more from the systems they already pay for, including Microsoft 365.

Book a free consultation at origamicsolutions.com or email Tim Pizanie at tpizanie@origamicsolutions.com.