

FREE RESOURCE

Tech Stack Self-Assessment

Ten yes/no questions that reveal whether your tools are helping or quietly working against you.

How to score

One point per "yes." Score each section, then read the verdict.

Core systems

- ☐ One CRM holds every client and prospect — no shadow spreadsheets.
- ☐ Email and calendar sync to the CRM automatically.
- ☐ E-signature is integrated — no printing, scanning, or "did you get my fax?"
- ☐ Scheduling links eliminate back-and-forth for routine meetings.

Automation & data flow

- ☐ Stage changes trigger tasks automatically — humans do not have to remember.
- ☐ Client intake forms feed directly into the CRM.
- ☐ You can pull "what is stuck?" reports without manual cleanup.

Team & security

- ☐ Every team member works in the same systems — no personal workarounds.
- ☐ Access is role-based; ex-employees are revoked the same day they leave.
- ☐ Client data is backed up and retention policy is written down.

Your score

- **9-10:** Solid stack. Optimize, don't rebuild.
- **5-8:** Gaps are costing you hours weekly. Fix integrations before buying new tools.
- **0-4:** Your stack is working against you. This is a systems project, not a tools project.

Want this built into your practice?

Book a free practice operations assessment at ajghosh.com