SIMPLIFY YOUR STACK
WORKSHEET

Use this worksheet to evaluate your current processes and technology stack with your team and board members.

Are you confident that your current technology aligns with your business growth strategy, drives productivity, and protects your data?

#	Question	
1	What are the top three business processes that drive profitability within your organization? (i.e., loan process)	
2	Map each process from start to finish and list the friction points internally and for your customers.	
3	List all the tech tools and software platforms your organization uses (i.e., communication tools, data and file storage, CRM platforms etc.)	
4	Highlight where existing technology and/or new technology implementation could/can help or hinder productivity and efficiency	
5	How many of those tools/platforms are being fully leveraged within your organization? What tools do your organization leverage the least?	
6	How often are you reviewing your existing tools to evaluate risk, upgrades, consolidation, relevance, etc.?	
7	Can you articulate where your employee and customer data lives and how it is secured? Are you compliant with local regulations?	
8	Does your organization have a clear, documented technology roadmap? Does everyone within your organization as well as your Board understand their role in the success of this plan?	
9	Are your technology vendors and consultants proactive and partnered in your long-term technology plan?	
10	If you had a magic wand, what would you change about your technology environment today?	

Request a free consultation | Contact acasey@thinkstack.co
Learn how Think|Stack can build technology that works for you and your customers

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