



BY INCPowerment



The Stack Audit.

What your scattered tools are really costing you, in money, time, and missed clients. A 15-minute worksheet for coaches, consultants, agents, and service businesses.

01 · Money

02 · Time

03 · Missed leads

04 · Your score

Your tools should work as hard as you do.

Most service businesses don't choose a messy setup. It grows one tool at a time: a website here, a scheduler there, an email app, a payment link, a spreadsheet to keep track of it all. Each one made sense when you added it. Together, they quietly cost you more than you think.

This audit helps you see the full picture in about 15 minutes. You'll total three kinds of cost:



Money

What you pay every month across separate subscriptions.



Time

The hours you spend doing by hand what a connected system could do for you.



Missed leads

The interest that slips away when follow-up depends on your memory.

How to use this worksheet

- Grab your bank or card statement for the last month, plus a rough sense of your week.
- Be honest, not perfect. Estimates are fine; the goal is clarity.
- Fill in each section, then add up your **Stack Score** on page 6.

What does your stack cost each month?

List every tool you pay for. Write the name of the tool you use and what it costs per month. If you pay yearly, divide by 12.

WHAT IT DOES	TOOL YOU USE	MONTHLY COST
Website or page builder		\$
Funnels or landing pages		\$
CRM or client tracking		\$
Scheduling and booking		\$
Email marketing		\$
Text messaging		\$
Forms and surveys		\$
Contracts and e-signatures		\$
Invoicing or checkout		\$
Courses, membership, or community		\$
Reviews or reputation		\$
Other:		\$
Number of tools: _____	TOTAL PER MONTH	\$

Monthly total \$ _____ × 12 = \$ _____ **per year**

Don't forget the people you pay to connect it all, like a VA or developer who keeps your tools talking. Add that under "Other."

Where does your week quietly go?

Estimate how many minutes each week you spend on these tasks by hand.

TASK YOU DO MANUALLY	MINUTES / WEEK
Copying leads from forms, DMs, or email into another tool	
Going back and forth by email to schedule calls	
Sending appointment reminders yourself	
Writing follow-up messages one at a time	
Creating invoices and chasing unpaid ones	
Sending welcome or onboarding materials to new clients	
Searching across tools for a client's details or history	
Switching between apps, logins, and tabs	
Fixing things when one tool stops talking to another	
Other:	
TOTAL MINUTES PER WEEK	

Minutes ÷ 60 = _____ hours/week × 4.3 = _____ hours/month

Hours/month × your hourly value \$_____ = \$_____ **in time each month**

Not sure of your hourly value? Use what you charge clients per hour, or your monthly income goal divided by the hours you want to work.

Where is interest slipping through?

Answer each question honestly. Every “No” is a leak, a place where someone who was interested may never hear from you again.

QUESTION	YOUR ANSWER
When someone fills out your form, do they get an automatic reply within minutes?	☐ Yes ☐ No
Do DMs, texts, and emails all land in one place you check daily?	☐ Yes ☐ No
Can people book a call with you without any back-and-forth?	☐ Yes ☐ No
Do booked calls get automatic reminders by email and text?	☐ Yes ☐ No
Do no-shows get a follow-up to reschedule without you remembering to send it?	☐ Yes ☐ No
Can you see every lead and where they stand in one pipeline?	☐ Yes ☐ No
Do leads who aren't ready yet keep hearing from you over time?	☐ Yes ☐ No
Can a client go from “yes” to paid and onboarded the same day?	☐ Yes ☐ No
Do happy clients get asked for a review automatically?	☐ Yes ☐ No
Could your business keep following up for a week if you stepped away?	☐ Yes ☐ No
NUMBER OF “NO” ANSWERS (YOUR LEAKS)	

A quick gut check: think of the last three people who showed interest and didn't buy. Did each one get a clear next step? If not, that's not a sales problem. It's a system problem, and it's fixable.

Add it up. See the whole picture.

YOUR RESULTS	TOTAL	POINTS
Number of tools you pay for (page 3)		
Hours per week on manual tasks (page 4), rounded		
Number of leaks (page 5)		
YOUR STACK SCORE		

How to score: 1 point for each tool beyond one, 1 point for each hour per week, and 1 point for each leak.
Example: 6 tools (5 points) + 4 hours (4 points) + 3 leaks (3 points) = a score of 12.

0–5

CONNECTED

Your systems are working for you. Focus on growth: new offers, more visibility, and tightening what already works.

6–12

STRETCHED

You're making it work, but your tools are starting to cost you growth. Consolidating now frees hours every week and closes your biggest leaks before they get bigger.

13+

SCATTERED

You are the system holding it all together, and that sets the ceiling on how many people you can serve. A connected foundation is your next move, not a someday project.

My monthly stack cost: \$_____ + my monthly time cost: \$_____

= What my scattered setup costs me each month: \$_____

One login instead of many.

The foundation your business scales on.

ProSuite brings your website, client list, booking, follow-up, and payments together in one place, so the conversations you start become clients you keep.

IF YOU LISTED...	PROSUITE GIVES YOU
Website, funnels, landing pages	Websites, funnels, and a blog on your own domain
CRM, scheduling, forms	Pipelines, booking calendars with reminders, and forms that tag leads
Email and text messaging	Campaigns, two-way texting, and one inbox for every channel
Contracts, invoicing, checkout	Proposals, e-signatures, invoices, and payments to your own Stripe
Courses or community	Courses, memberships, communities, and a client portal
Manual follow-up and reminders	Automations that work between your conversations, plus AVA, your 24/7 AI guide

STARTER

\$97/mo

Website, leads, booking, and follow-up

PROSUITE · RECOMMENDED

\$147/mo

Plus contracts, texting, reviews, phone support

PROSUITE+

\$297/mo

Plus courses, community, and client portal

Every plan includes unlimited contacts, a ready-made template for your business, and an onboarding call. Pay annually and get two months free. Compare your total from page 6 to the plan that fits.

Ready to connect the pieces?

Not sure which plan fits? Take the 2-minute plan finder at myprosuite.com/get-started or book a walkthrough at myprosuite.com/contact.