

Technology Audit Template

Most small businesses are paying for tools they don't use, missing tools they need, and using tools that don't talk to each other. This audit fixes all three.

Nicole's observation: After 50+ business tech audits, the average small business is spending \$300–\$700/month on overlapping tools that could be replaced by a single integrated platform for \$127–\$200/month. This audit helps you see exactly where your money is going — and where it shouldn't be.

Part 1: Complete Your Tech Inventory

List every tool, app, software, or subscription your business uses. Don't filter.

Tool / App	Category	\$/Month	Who Uses It	How Often	Integrates With
_____	_____	\$ _____	_____	Daily/Wkly/Rarely	_____
_____	_____	\$ _____	_____	Daily/Wkly/Rarely	_____
_____	_____	\$ _____	_____	Daily/Wkly/Rarely	_____
_____	_____	\$ _____	_____	Daily/Wkly/Rarely	_____
_____	_____	\$ _____	_____	Daily/Wkly/Rarely	_____
_____	_____	\$ _____	_____	Daily/Wkly/Rarely	_____
_____	_____	\$ _____	_____	Daily/Wkly/Rarely	_____

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_____	_____	\$ _____	_____	Daily/Wkly/Rarely	_____
_____	_____	\$ _____	_____	Daily/Wkly/Rarely	_____
_____	_____	\$ _____	_____	Daily/Wkly/Rarely	_____
_____	_____	\$ _____	_____	Daily/Wkly/Rarely	_____
_____	_____	\$ _____	_____	Daily/Wkly/Rarely	_____

Total Monthly Tech Spend: \$ _____ | Annual Tech Spend: \$ _____

Part 2: Category Coverage Check

Note the tool you're using for each category (blank = gap):

Category	Tool Used	Working?	Key Question
CRM / Contact Management	■ None _____	■ Yes ■ No ■ Sort of	Are all contacts in one place with full history?
Email Marketing	■ None _____	■ Yes ■ No ■ Sort of	Can you send sequences and automated campaigns?
Scheduling / Booking	■ None _____	■ Yes ■ No ■ Sort of	Can clients book without back-and-forth?
Project / Task Management	■ None _____	■ Yes ■ No ■ Sort of	Do you know every client project's status at a glance?
Documents / E-Signature	■ None _____	■ Yes ■ No ■ Sort of	Can clients sign contracts digitally from any device?
Payment Processing	■ None _____	■ Yes ■ No ■ Sort of	Can you invoice and collect payment easily?
Social Media Management	■ None _____	■ Yes ■ No ■ Sort of	Can you schedule posts and monitor engagement?
Website / Funnels	■ None _____	■ Yes ■ No ■ Sort of	Does your site convert visitors to leads?
Analytics / Reporting	■ None _____	■ Yes ■ No ■ Sort of	Can you see what marketing is actually working?

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Team Communication	■ None _____	■ Yes ■ No ■ Sort of	Does your team communicate in one organized place?
Cloud Storage / File Sharing	■ None _____	■ Yes ■ No ■ Sort of	Are files organized and accessible from anywhere?
Security / Password Management	■ None _____	■ Yes ■ No ■ Sort of	Are accounts secure and credentials organized?
Video Conferencing	■ None _____	■ Yes ■ No ■ Sort of	Can you meet clients and team virtually?
Accounting / Invoicing	■ None _____	■ Yes ■ No ■ Sort of	Is financial tracking clean and current?

Part 3: Integration & Overlap Analysis

These are your biggest cost and efficiency opportunities:

Duplicates	Name 2+ tools doing the same job (common: separate email + CRM + scheduler that all overlap): _____
Integration gaps	Name 2 tools that should talk to each other but don't: _____
Manual workarounds	What repetitive task do you do manually that should be automated by now? _____
Ghost subscriptions	Which tools are you paying for but barely using? _____
Team friction	Which tool does your team find most frustrating or confusing? _____
Missing capability	What can't you currently do that's costing you time or clients? _____

Part 4: Priority Action Plan

Based on your audit, list your top 3 actions:

Priority	Action	Expected Benefit	Target Date
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#1 — High Impact			
#2 — Medium			
#3 — Quick Win			

Ready to take the next step? This template shows you where you are. Certified Tech Solutions builds the roadmap to where you want to be — with the right tools, properly integrated, and actually working for your business. Nicole offers a personalized Tech Assessment that walks through your audit findings and maps your first three steps. Visit ctsolutionsonline.com/contact or take the free Tech Chaos → CALM™ Survey at ctsolutionsonline.com/chaos-to-calm-score