

Software Stack Planner

Plan a lean set of tools that covers your business without unnecessary overlap.

1. Start with your workflow

- ☐ List the jobs you need to manage: billing, sales, delivery and marketing.
- ☐ Reuse a current tool when it already meets the requirement.
- ☐ Choose one account owner for each essential tool.

2. Check how tools work together

- ☐ Define the data that must move between tools.
- ☐ Use built-in integrations before adding extra automation.
- ☐ Check ongoing maintenance and what happens if an integration fails.

3. Review the stack regularly

- ☐ Add up base plans, seats, usage charges and paid add-ons.
- ☐ Record renewal dates and export a backup of key data.
- ☐ Review unused subscriptions and overlapping features every quarter.

Your stack worksheet

Business job	Chosen tool	Monthly cost	Owner

Estimated monthly total: _____

Next review date: _____