TECH SELECTION BUILDER

Now that you've identified opportunities to improve your tech stack, you can use the below table to define your technology requirements. Consider the future of your business and your ideal client persona. This will help you select the right new technology.

What are you adding/replacing and why?		Est. Budget (range)	
Desired Features and Functionality		Integration(s) Required	Stakeholder(s)
With your processes, client service model, and value proposition in mind, decide what you need from the new tech. Consider what you must have now, what would be nice to have, and what you don't want based on past experiences (e.g. poor support).		Best practice is to start with your custodian. Then, consider where you want your source of data "truth" to be. Any other tools you want to "talk" to each other?	List anyone who will be working with this product and make sure they are involved in decision making later on.



TECH SELECTION BUILDER

Use this side as a guide for your technology sales calls. Send them your specific questions, keeping in mind your research responses, to make your demo/introductory sales calls productive and efficient.

	Tech #1	Tech #2	Tech #3
	[Name]	[Name]	[Name]
AVERAGE RATING (use surveys & read reviews)			
YEARS IN BUSINESS (where do you see yourself in 5 years)			
INTEGRATION(S)	List your requirement(s) here	List your requirement(s) here	List your requirement(s) here
DATA SECURITY/STABILITY (cloud, personal server)			
ANY TRAINING/SUPPORT? (onboarding and data migration)			
COST/TERM/COMMITMENT			
FEATURE(S) & FUNCTIONALITY (prioritize and list your top 5 requirements from the reverse side)	1. Feature: 2. Feature: 3. Feature: 4. Feature: 5. Feature:	1. Feature: 2. Feature: 3. Feature: 4. Feature: 5. Feature:	1. Feature: 2. Feature: 3. Feature: 4. Feature: 5. Feature:
NOTES			

