Tech & Operations

Audit Template

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A comprehensive template to assess your current technology stack and operational processes.

1. Core Technology Stack

What software or tools are currently being used for key business functions (e.g., CRM, accounting, operations, HR)?

Are there any duplicate or redundant systems?

How well do these systems integrate with each other?

Are they cloud-based, on-premise, or hybrid?

2. Operational Workflows

Describe your current workflows for delivering your product or service.

Where do manual processes exist?

[blank response box]

Which steps are most prone to delays or inefficiencies?

[blank response box]

3. Data Flow and Integration

How does data move between different departments or platforms?

[blank response box]

Is data duplicated across systems?

Are there any existing APIs or middleware in use?

4. Roles and Ownership

Who manages each major system or tool?

Is there clear ownership for systems, processes, and support?

Do staff feel confident using these tools, or is training required?

5. Pain Points and Bottlenecks

What frustrations or recurring issues do staff report?

What is the impact of those issues (time, money, missed opportunities)?

Which issues are considered most urgent?

Scoring Summary

Use the table below to rate your systems in each area from 1 (low maturity) to 5 (high maturity).

1 = Unstructured / Manual / Fragmented

5 = Automated / Integrated / Clear ownership

Area	Score (1–5)
Core Technology	
Operational Workflow	
Data Integration	
System Ownership	
Efficiency	

Total Score: _____ / 25

If your score is:

- Under 10: Immediate attention needed

- 11–18: Room for improvement

- 19–25: Strong foundation, potential to optimise
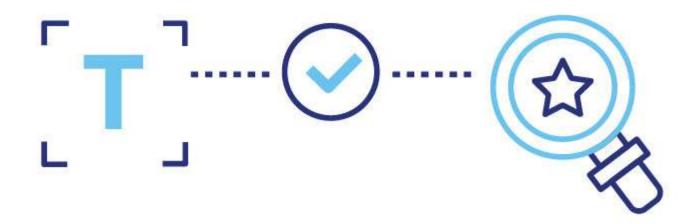
What to Do With This Audit

This document is intended to help you gain visibility over your technology and operational environment.

You can use it to:

- Brief internal stakeholders

- Support a conversation with IT or operations consultants

- Evaluate readiness for automation, offshoring, or digital transformation projects

Not sure what to do next? We offer a free 30-minute consultation to help you prioritise next steps.

Visit planbconsultants.com.au or email support@planbconsultants.com.au to book.

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