

Tool Sprawl Diagnostic Worksheet

Domain Methods

WHAT THIS WORKSHEET IS FOR

Use this in a stack review before the next vendor search starts. The goal is to decide whether the pain is really a capability gap or a trust, ownership, and workflow problem hiding between the tools you already own.

STEP 1: INVENTORY THE CURRENT STACK

- List the systems involved in the decision that keeps breaking: CRM, billing, ad platforms, warehouse, BI, enrichment, activation, spreadsheets, and any manual exports.
- For each one, name the real owner and the workflow it is supposed to support.

STEP 2: SCORE THE CURRENT ENVIRONMENT FROM 1 TO 5

- Capability gap: does the current stack truly lack a required feature or destination?
- Definition drift: are teams using different meanings for the same metric or object?
- Ownership clarity: does someone own the number, the sync, and the exception path?
- Workflow fit: does the output land in a tool and cadence people already use?
- Redundancy: are multiple tools doing overlapping work badly enough to create confusion?

STEP 3: ELIMINATE FAKE TOOL NEEDS

- Mark any pain that is really missing governance, weak field hygiene, undocumented logic, or a handoff problem.
- Circle the few pain points that still look like genuine technical constraints after that filter.

STEP 4: DECIDE THE NEXT MOVE

- Fix in current stack now:
- Needs ownership or governance work first:
- Real vendor gap worth evaluating:

- Tool or workflow we should sunset:

DECISION SUMMARY

- Decision we are trying to improve:

- Most expensive source of drag today:

- First change to make before any new demo:

- What would have to be true for a new tool to be justified: