

Marketing Tech Stack Audit Checklist

Use this checklist to evaluate, streamline, and optimize your marketing technology stack. Run this audit quarterly to eliminate redundancy, reduce costs, and maximize ROI.

Step 1: Inventory Your Tools

- List every tool in your stack: name, function, cost, and users
- Identify the core function of each tool (CRM, email, analytics, etc.)
- Note how frequently each tool is used

Step 2: Identify Redundancies and Gaps

- Look for overlapping functionality
- Eliminate duplicate tools
- Identify manual tasks that can be automated

Step 3: Prioritize Integration

- Highlight tools that integrate via native connectors, API, or Zapier
- Remove tools that don't integrate well
- Evaluate centralized platforms (e.g., TapClicks) for data unification

Step 4: Evaluate ROI

- Match each tool to a clear business objective
- Estimate the ROI based on usage and outcomes
- Remove tools with low ROI or unclear benefits

Step 5: Test and Optimize

- Trial new tools before fully integrating
- Review performance quarterly
- Update the stack based on team feedback and business goals