



## Execution Workshop

### Defining the Ideal Technology Stack

What's all the hullabaloo about having a defined tech stack? If you find yourself learning or supporting software for a single client or discovering that your team members are using different apps for the same thing or notice that you're entering the same information in multiple applications, then this workshop is for you! Join us for 4 weeks of technology deep dive to learn how to craft the Ideal Technology Stack for your practice.

### Workshop Description

Start your journey to standardization and automation by defining your business model around a singular group of integrated software solutions used for all clients and all team members. Streamline infrastructure, people & process technology, and back-office operations.

### Syllabus

- 1) Week 1: Taking an Infrastructure Inventory
  - a. Identifying the gear you currently use, wish you were using or no longer need to use
  - b. Identifying connectivity requirements
  - c. Identifying hardware security policies and potential gaps
- 2) Week 2: Taking an Application Inventory
  - a. People and Process Applications
  - b. Operational Applications
  - c. Identifying redundant applications
  - d. Identifying gaps in the stack
- 3) Week 3: Vetting Technology
  - a. Comparing Feature Sets
  - b. Vetting Beyond the Features – Company, Support, Peer Evaluations
- 4) Week 4: Crafting a Technology Plan
  - a. Identifying Objectives based on Greatest Outcomes
  - b. Prioritizing Objectives
  - c. Mapping a Realistic Timeline