



Is the Tool Really the Problem?

Do we have our processes documented?

Are there recurring problems?

Have I enforced the processes or held staff accountable?

Are we using our existing tool the way it was designed?

Do we operate in silos?

Are we still using Google Sheets or Excel for reporting or status meetings?

Are everyone's roles and responsibilities clearly outlined?

Are we setting expectations and managing them?

Do we need to use our time better, spending less time creating status reports and meeting minutes?

Are we communicating everything by email or getting lost in Slack or Teams?

Does Leadership see the value?

Did you self-implement?

Are we using multiple tools that do similar things, such as Basecamp, Asana, Trello, QuickBooks, Email, Slack, Google Drive, or Dropbox?