



TECH STACK & AI ASSESSMENT WORKBOOK



SYNERGY PATHFINDERS, LLC ®

synergypathfinders.com | (703) 965-1355



HEATHER GARLAND

FOUNDER

I've created this workbook to help guide you through an important process: evaluating your organization's technology and AI capabilities. As technology continues to evolve, it's more important than ever to make sure your tools are aligned with where you want to go as a business.

This workbook will help you dig into what's working, what could be improved, and where AI and your current tech stack could play a bigger role in making things more efficient and scalable. Whether you're aiming to streamline operations, enhance customer experiences, or simply ensure that your technology can grow with you, this is your go-to resource.

I've broken everything down into simple sections to make it easy for you to assess and strategize. Take your time, dive deep, and use this as a tool to make informed decisions that will help you succeed in the long run.



About Us

At Synergy Pathfinders, we specialize in helping organizations unlock their full potential by optimizing both technology and processes. We understand that in today's fast-paced business environment, staying competitive requires more than just keeping up with the latest tech. It's about strategically leveraging technology to streamline operations, enhance efficiency, and drive growth.

Our approach combines cutting-edge technology solutions with proven process optimization strategies to ensure your business is operating at peak performance. Whether it's implementing AI-powered tools, refining your tech stack, or redesigning workflows for maximum productivity, we focus on creating synergies that drive sustainable success.

We're passionate about partnering with you to help navigate the complex landscape of technology and process improvement, empowering your company to move faster, smarter, and with more agility. Let's work together to unlock the future of your business!

Introduction to the Assessment



The purpose of this workbook is to help you assess your organization's technology stack and artificial intelligence (AI) usage. This includes helping you to align your tech stack assessment with business goals (e.g. efficiency, innovation, cost reduction), assess current AI adoption for scalability and competitive advantage, and to identify any technology gaps or inefficiencies.

What specific areas of the tech stack will be evaluated (e.g. infrastructure, software tools)?

What are the intended outcomes of the AI assessment (e.g. identifying AI opportunities, improving performance)?

How to Use This Workbook



- Complete each section thoroughly to understand the current state.
- Provide real-world examples and feedback from users where applicable.
- Follow the timeline outlined for action items.



QUESTIONS?

heather@synergypathfinders.com

synergypathfinders.com

Facebook: @synergypathfindersllc

LinkedIn: @synergypathfinders

Usage and Ownership

Objective: Identify who is responsible for each tool and how widely it is used.

Questions to answer:

- Which department(s)/ role(s) uses each tool?
- Who owns and manages the tool (IT department, business unit)?
- Are there any training or support challenges?

Checklist:

- Assign tool ownership to a specific department.
- Note frequency of use (daily, weekly, monthly).
- Identify any gaps in training or documentation for users.



Integration and Interoperability

Objective: Assess how well the tools integrate with one another and identify integration challenges.

Checklist:

- List existing integrations (e.g. CRM with ERP, finance system with HR software).
- Identify any integration failures or challenges.
- Assess whether integration improves efficiency or creates silos.

Tech Stack Health Check

Objective: Evaluate the overall condition of the tools and platforms.

Questions to answer:

- Are there any outdated systems or tools that need to be upgraded?
- Are all systems patched and regularly updated?
- Are there any compliance concerns or security vulnerabilities?

Health Check Questionnaire:

- Are software versions up-to-date?
- Are there any systems scheduled for retirement soon?
- Are any tools or platforms missing key security features (e.g., encryption)?



AI Application Areas

Objective: Document where and how AI is currently being applied.

Checklist:

- Identify use cases where AI is implemented (e.g., customer service, predictive analytics, automation).
- Record the business outcomes achieved with AI (e.g., time saved, cost reduction).
- Evaluate any limitations or challenges of the AI applications.

Checklist:

- AI for data processing (e.g., automating report generation).
- AI for customer-facing functions (e.g. chatbot, virtual assistants).
- AI for operational efficiency (e.g., supply chain optimization).



AI Adoption Maturity

Objective: Evaluate the maturity of AI adoption in your organization.

AI Maturity Scale (1-5, with 1 being “exploratory” and 5 being “fully integrated”):

- Initial experimentation with AI.
- Limited AI applications in specific areas.
- AI is integrated but not widespread across the organization.
- AI is widely used and integrated into business processes.
- AI is embedded and drives core business value.



AI Governance and Ethics

Objective: Review AI governance policies and ethical considerations.

Checklist:

- Is there a defined AI ethics policy in place?
- Are there training programs for ethical AI usage?
- Are AI algorithms explainable and transparent?

Technology and AI Performance Evaluation

Tech Stack Performance Metrics

Objective: Assess the effectiveness and efficiency of the tech stack.

Checklist:

- Tool/ system uptime and reliability (e.g., availability rate).
- User satisfaction ratings from employees.
- Frequency of system downtime or issues.

Example Performance Metrics:

- Uptime: 99.9% for major systems.
- User Satisfaction: 4.5/5 from department surveys.



AI Performance Metrics

Objective: Measure the performance of AI tools and their impact on business.

Checklist:

- Accuracy and precision of AI predictions (e.g., customer churn prediction).
- Impact on operational efficiency (e.g., time saved).
- Return on Investment (ROI) from AI applications.

Gap Analysis

Objective: Identify any areas where the tech stack or AI implementations are falling short.

Checklist:

- Identify areas with outdated or redundant tools.
- Examine AI gaps - areas where AI can be applied but isn't yet.
- Evaluate missed opportunities in tech stack efficiency.



Strategic Recommendations

Tech Stack Recommendations

Objective: Provide actionable recommendations for improving the current tech stack.

Checklist:

- Upgrade outdated systems to modern, scalable platforms.
- Consolidate tools to eliminate redundancy.
- Invest in better integrations for enhanced collaboration.



AI Integration Recommendations

Objective: Identify new AI opportunities for integration or optimization.

Checklist:

- Explore AI-powered automation to reduce manual tasks.
- Implement AI-driven insights for decision-making.
- Expand AI applications to additional departments.



Future Tech Trends and AI

Objective: Identify emerging tech trends and how they could impact your organization.

Checklist:

- Stay informed about advancements in AI (e.g., generative AI).
- Consider next-gen tools for data analytics and cloud computing.
- Explore industry-specific technologies that could provide competitive advantages.

Action Plan and Next Steps

Implementation Plan

Objective: Outline actionable steps to implement the recommendations.

Checklist:

- Create a timeline for each recommendation.
- Assign responsibilities for each action item.
- Define KPIs to track success.

◆◆◆

Resource Allocation

Objective: Identify the resources (people, budget, tools) needed for implementation).

Questions to answer:

- What budget is required for tool upgrades and AI investments?
- Who will manage the change process (internal or external support)?

◆◆◆

Monitoring and Review

Objective: Establish how progress will be tracked and adjustments made.

Checklist:

- Set periodic review meetings to evaluate progress.
- Collect feedback from users regularly.
- Adjust the plan based on real-time results.

NEED MORE INSIGHT & SUPPORT?



Scan the QR Code and
Schedule a free consultation ***TODAY!***

