

Tool Stack Inventory and Cut List

Use the method

Identify the tools your business uses and decide which to keep, combine, test, or retire. Use this when people cannot agree where information belongs or when several tools do the same job. The output is a short decision list with owners and safe transition steps.

- 1. Inventory actual use.** List tools people use, including spreadsheets, personal accounts, shared drives, and subscriptions. Do not rely only on a purchasing list.
- 2. Name the job.** Describe the specific business job each tool performs and the person responsible for it. Identify the authoritative location for each important record.
- 3. Record dependencies.** Note users, recurring cost if known, renewal date, connected tools, stored records, and whether data can be exported. Mark unknowns for follow-up.
- 4. Find overlap.** Group tools doing the same job. Ask whether they serve different needs or simply create duplicate records and extra reconciliation.
- 5. Choose a disposition.** Keep tools with a clear job; combine overlapping workflows; test uncertain replacements; retire only after records and access dependencies are handled.
- 6. Verify before cancellation.** Export required records, test the replacement, notify affected users, and name a rollback route. Confirm results before cancelling or deleting.

Worked example

Illustrative inventory: an inquiry spreadsheet and a shared customer tracker both hold contact details. The office coordinator owns intake, but the two lists disagree about customer status.

Decision: retain the shared tracker as the customer record and move required spreadsheet fields into it. Keep the spreadsheet temporarily as a read-only reference. No subscription is cancelled during the test.

Transition: coordinator exports a copy, migrates ten test records, compares names and statuses, and asks the service owner to confirm completeness. After two weekly reviews, the coordinator archives the old list according to the business retention rules.

Success evidence: new inquiries appear in one place and no active customer is missing. A backup exists and the team knows where to work.

Before you put it to work

- ☐ Every proposed retirement has a migration or retention plan.
- ☐ Unknown dependencies have been checked before access is removed.
- ☐ A replacement has been tested using real workflow needs.
- ☐ Users can identify the authoritative record location.

If the problem keeps returning

If overlap returns, define the business job and record owner before introducing another tool. A new subscription does not resolve an unclear handoff or an undefined record location.

Connect the tools

Use BO-02 to clarify handoffs and BO-04 to review decisions weekly.

First use

Use the worksheet on the next page for one real task. Complete the decision fields, name the person responsible, and choose a review date. Duplicate the worksheet when you need another record.

Working worksheet

Name or team _____ Date _____

Inventory scope

Team, workflow, owner, review date, and authoritative record locations.

Tool inventory

Tool and job	Owner and users	Cost and renewal	Records and dependencies	Keep combine test retire

Duplicate rows or this worksheet for additional records.

Overlap finding

Which tools duplicate the same job or records?

Complete and review

Transition decision

Tool, keep combine test or retire, reason, owner, required approval, and date.

Migration and verification

Backup, export, replacement test, record comparison, user notice, and result.

Retirement and rollback

Retention rule, cancellation date, unresolved dependency, and restoration route.

Review after use

Which duplicate record or unnecessary step disappeared? _____

Which tool remains because its dependency is still unresolved? _____

What evidence is needed for the next retirement decision? _____

When will the owner review the stack again? _____

Next action _____ Owner _____ Due _____