The IT Tech Stack Consolidation Checklist

Managing way too many tools? Got two or three cloud phone systems and a few messaging and video conferencing apps that your employees aren't even using regularly? If your tech stack's looking a little bloated and you're thinking of consolidating, here are a few must-dos to check off your list.

From how to assess your current stack, to vetting new software, this 15-item checklist is condensed enough to not overwhelm you as you get started—but detailed enough to give you the "why" behind the reasons for each step.

Hat tip to our own IT team for sharing their insights as they are juggling our own enterprise tech stack.

Assess your current state

- [ ] 1. Know your current landscape.

Do a thorough assessment of your business need(s)—and the tools you already have. Unless you're a tiny startup, there's likely already a considerable tech stack your team is using.

- [ ] 2. Assess which software in your current arsenal should be kept.

This will tell you what can be discarded or potentially consolidated. Which tools have outlived their usefulness, or won't be able to scale with your future plans?

- [ ] 3. Know which integrations your team needs.

Integrating all the tools you're using where possible is a huge opportunity. Often, it can expand the abilities of the tools themselves, and it makes life easier for your end users too.

For example: Dialpad, a unified communications + contact center platform, integrates with CRMs like Salesforce and HubSpot to automatically log calls and activities for reps—and also embeds a dialer in the CRM so they can take phone calls without leaving that window.

- [ ] 4. Know what annual contract costs you're currently paying.

Compare that against the planned budget for your potential consolidated stack.
(Dialpad tip: Think in terms of the next 3–5 years—not just your costs today.)

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- [ ] 5. Find out the usage metrics for the tools you're currently using.

  For example, how many active users do you have, and how many people are actually using them on a daily basis? This will help you make an even stronger case for consolidation and get buy-in across the company.

- [ ] 6. Find out how much your employees like using your current tools.

  This may not seem important, but this directly influences whether your employees will actually adopt the tools you choose. (Sending a survey is one easy way to find this out.)

Start vetting

- [ ] 7. Do an initial assessment of the potential challenges of your existing tools.

  Both from a scalability and global rollout perspective! This information will help you vet potential vendors that will be part of your newly consolidated arsenal.

- [ ] 8. Set your timeline.

  Remember, this often isn't just a single go-live date. There are many mini-timelines too! (Like the budget timeline, the implementation and change management timeline, and of course, the cutover from your existing tools and go-live date.)

- [ ] 9. Know your change management needs.

  This includes determining the services, support and maintenance model you'd need to help your company adopt the robust and versatile tools that will be a part of your new tech stack.

The last few boxes to check

- [ ] 10. Know if you'll need to support remote or in-office employees (or both).

> **For example:** If you have a remote or hybrid team, a landline or PBX phone system probably isn't the best choice. A cloud-native solution, on the other hand, would let an IT team add users, manage phone numbers, and basically do all the everyday admin, completely remotely.

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☐ 11. Don't forget about security and compliance.

If you're in a more regulated industry, like healthcare, law, or financial services, this step is especially important. Whether you're expanding your relationship with current vendors or switching to new ones to streamline your tools, make sure they're able to help your business or organization stay compliant.

> **Dialpad tip:** Ask for the vendor's security, compliance, and privacy documents such as DPA, SOC2, and GDPR compliance.

If you're choosing new vendors to help with consolidation…

☐ 12. Will you need a POC?

Provide your critical business use cases and request for a demo or POC before making any major new software purchase.

☐ 13. Request and speak to customer references.

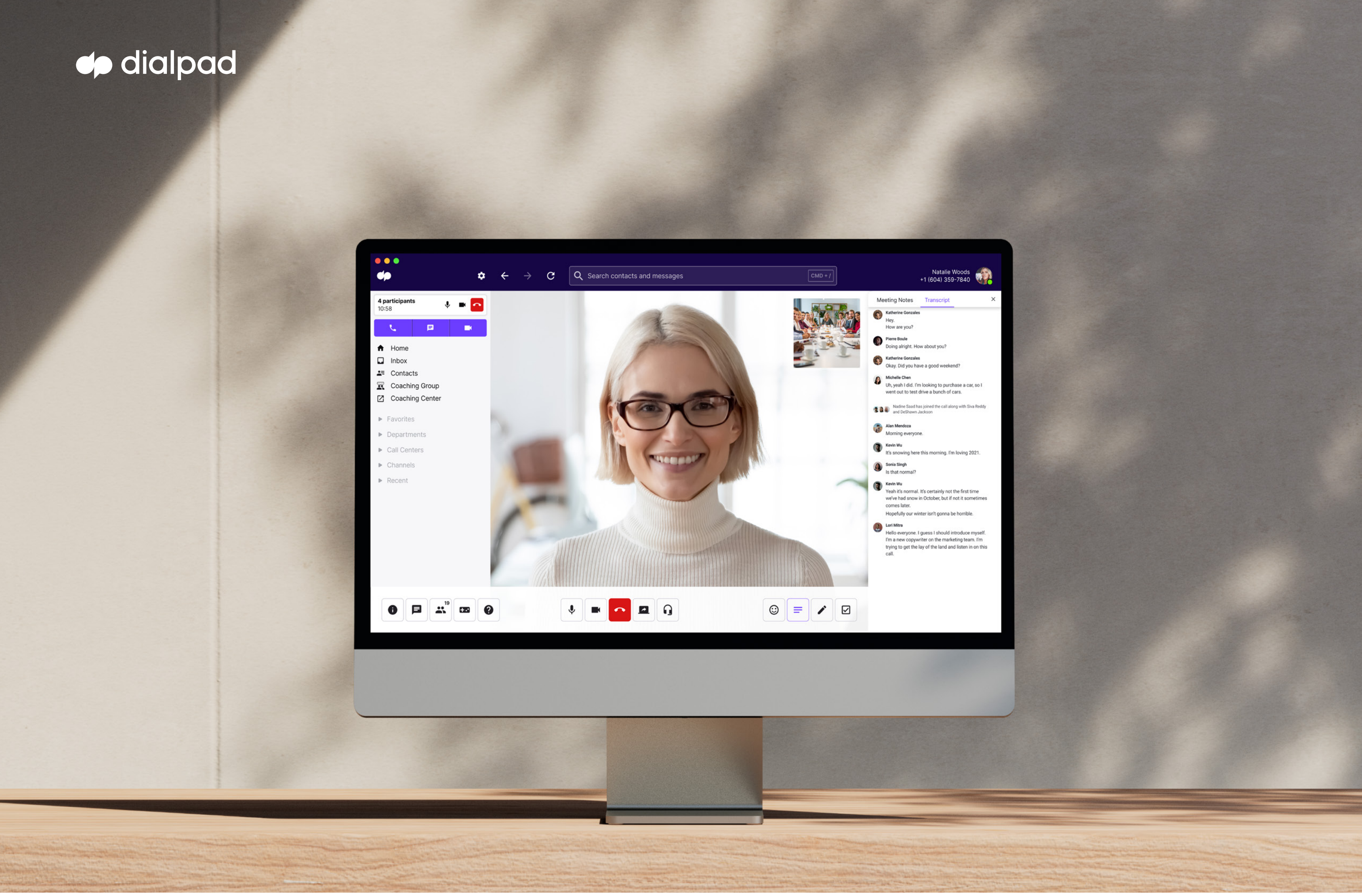
Ideally, these folks will be in a similar space as your business. This will give you another perspective and help you better understand any challenges when it comes to implementation, adoption, support, and maintenance with this vendor.

☐ 14. Find out what deployment and ramp time will look like.

This is the type of thing that won't show up on the pricing page of your vendors' websites. Make sure to ask about this during the demo or POC.

☐ 15. Determine and involve key stakeholders.

This will likely span multiple departments, and they'll appreciate being involved early in the product demos and selection process.



What is Dialpad?

Dialpad is an industry leader in AI-powered communication and collaboration, designed to consolidate all internal and external communication tools (including contact center functionality) into one intuitively designed platform. One account, one login experience, one cohesive interface. Make phone calls, have video meetings, send SMS/MMS + team messaging, and more, from a single beautiful app.

Get a product tour of Dialpad ↗