



5 Key Considerations When Evaluating Systems To Add To Your Tech Stack



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In today's digital economy, companies heavily rely on 3rd party applications to support their day-to-day operations.

These tools individually solve at least one need that the organization has - from payroll and time-off requests to tracking revenue and generating leads. Magical results appear when these helpers all intersect, creating an effective tech stack.

What is a tech stack?

Big brand names like Uber, Amazon, and Airbnb optimize their technology stack constantly to stay competitive in their development process.

But how exactly do companies decide what tools should go into their technology stack? Many dimensions need to be accounted for, such as price and integration ability. What's more, you already have a tech stack and all the apps you're currently using in your business!

Let's look at how you can evaluate your current tech stack and how to improve it.

How to define your current technology apps?

It's essential to set the proper foundation from the get-go - your business is unique, and your tech stack will be as well.

Your organization has its own sets of goals and challenges that will be supported by technology. No app can check all boxes, so you must find the right one for each of your needs.

This is where you should start - auditing your existing technology stack based on business needs.

1

Create silos for all your business operations. An easy way to do this is to define your departments and their processes.

For example, the marketing department can have a PR silo and a paid acquisition silo. Processes from each silo will intersect, but it's essential to have an overview.

2

Make an inventory of the apps used by that department inside its respective silo. This step is best done collaboratively with each department manager. Take note of all the tools used by that team and their role in the process. If a vital activity does not have tools assigned to it, then that's an opportunity!

Continuing the example: The marketing team's mar-tech stack (tech stack specific to marketing activities) consists of the website, email platform, ads platforms, social media, and analytics. Websites will be present in all the silos, while the social media platforms will only be present in the PR silo if you don't run ads on them.

3

Define the data relationships between these tools. Your tech stack runs on data transmitted through integration between the tools. This is usually an automatic action, but data is manually placed from one tool to another in some cases.

For example, the marketing department runs Google Ads, directing traffic toward the company website. The company website then routes all the traffic data into Google Analytics and new leads into the email platform.

There is no right or wrong way to define these!

The only important thing here is for your organization to understand the diagram fully and for it to prove useful when starting to optimize. Bonus points if the tool has a mobile application as well.



Don't ignore the format of the diagram!

The more visual and clean it is, the more it will prove an essential asset for all teams. There are tools out there that help you build such a diagram. Apps like Lucid or Miro are recommended as they are free and easy to use.

How to Improve Your Tech Stack

Now that you've mapped out your current tech stack, it's time to audit and improve it. Regardless of the department for which you're optimizing a stack, there are a few general elements to consider when choosing the right tools.

Utility

Does this tool provide value in our business process?

Consider why the teams use the web app. Is that feature present in any other tool that you currently have? Maybe there is room for consolidation here. There are many tools available on the market, all being pretty similar in their feature sets, so being efficient and using a tool's entire arsenal is the right choice.

Price

Do we get a positive ROI from using this tool? Does the process provide positive ROI?

Price is a significant factor in deciding the acquisition of a tool. Some vendors vary in pricing models - charge per volume used, flat rates, or user-based. Set some time apart to research what a specific tool's competitor offers and what price. Who knows, you might cut high costs here!

Integration

Does this tool have the means to integrate with our other tools? If so, is it a native integration?

Data is an essential asset to organizations. Having access to specific data from one tool to another is almost a requirement in 2022. Luckily, many great web apps have native integrations with other players on the market, helping your team save time and open new possibilities for better work

If there are no native integrations, don't worry! Most companies are using 3rd party data connector tools such as Zapier or IFTTT to move valuable data around platforms. They're easy to use, and both have a free plan!

Accessibility

Is the web app easy to use and onboard new hires into?

User-friendliness is a crucial aspect of any right tech stack. If your organization doesn't have the resources to hire a dedicated operations person, then it's essential to make sure that these tools are easy to use by your teams. Don't shy away from asking for demos of the app to see its user interface. A sales representative will gladly book a demo with you most of the time. Again, a mobile app is a big plus here.

Scalability

Will the tool keep up with my business growth?

Last but not least, if your business is a startup or in a high growth stage, consider a tool's ability to scale up. How exactly? Check to see if the tool allows for progressively larger volumes of data, growth-friendly pricing plans, and advanced functionality.

While it seems like a lot to watch out for when evaluating a web app, the benefits of improving your technology stack are worth it in the long run. It's a safer bet to outsource your need towards a tool with excellent user experience than hiring a full- stack developer to build it for you.

Your company is constantly evolving, and so is the market for new tools. A good practice is to keep up to date with what new apps pop up through sites like ProductHunt and G2.





Potential technology stacks for your company

Now that you have your current stack mapped out and know what to look for when optimizing it, let's look at some general tools that you could use.



Customer Relationship Management tech stack

A CRM is an advanced database of your clients. Customer details such as email, phone number, and their last purchase from you are easy to find through the CRM.

A CRM shines brightest for the sales team since they have access to a log of activities that a client went through. For example, any sales call you might have had recently is recorded in the CRM and custom notes you took during the call.

| Great CRMs for SMBs: HubSpot Sales Hub, Pipedrive, or Zoho



Project Management tech stack

Many web applications support project management out there. You should look for the ones that fit your business's type of work. A project management tool specialized in the AGILE methodology might not be a good choice for an accounting firm, and a basic planning tool will not fit a web development company.

| Good project management tools for SMBs: ClickUp, Asana, or Trello

Human Resources tech stack

Human Resource Management Systems (HRM) and Human Capital Management (HCM) software are human resource management platforms that integrate functionality from multiple human resource software categories.

Human resource management systems (HRM) are used to centralize and manage all human resource information in a modular fashion. Human resource management systems enable businesses to consolidate and streamline high-value human resource functions such as recruiting, performance reviews, and employee training.

These suites are most frequently implemented by human resource departments in large corporations but can also be adapted for SNBs. Human resource management systems, by virtue of their modular design, can be customized and organized to meet the unique requirements of an organization.

| Excellent human resource apps: Paylocity, BambooHR, or Personio

Internal and external communication tech stack

Internal and external communications tools serve a similar function but for different audiences. They help your team get a message across in a reliable, fast, and secure way. People are also starting to look for mobile-friendly applications to check messages whenever (and wherever) they are.

Internal communication software, sometimes called business messaging software, provides users with instant messaging platforms that enable direct and group communication within an organization. These tools make communicating with coworkers as simple as texting or chatting with friends on social media. Most internal communication options include emojis and GIF support to encourage authentic and natural workplace conversation.

They can either be apps within a suite or standalone ones.

| Standalone internal communications apps for SMBs: Slack, Chanty, or Discord

On the other hand, external communication tools cover a more comprehensive range of channels. They are usually tied with the marketing channel through which the company targets people. It's recommended that these apps have a segmentation feature, work well on many device types, and integrate with other marketing tools. Interactivity is a key feature.

| External communication apps for SNBs: MailChimp, Twillio or Freshworks

Document Management tech stack

While document storage may not seem like the most exciting part of your tech stack, it plays a large foundational role in your day-to-day workflow. The way you store, share, and request documents can vastly improve your team's productivity. Compared to storing files locally on individual computers, a cloud-based document management solution allows access to all of your documents anytime, anywhere, without the risk of security threats.

| Recommended document management solution for SMBs: SmartVault

Accounting tech stack

Having a web app to cover your accounting process is essential. Luckily, many great solutions are used worldwide that fit any type of company.

What's important to look out for when choosing an accounting tool is based on the type of work you need it to do and the format. Budgeting, invoicing, financial reporting, inventory management, and payroll are the main areas and are usually bundled up in the same tool. Each country has a slightly (or more) different way of doing financial reporting, so research the formats supported by that tool.

| Recommended accounting software for SMBs: Quickbooks, FreshBooks, and Sage Intacct

Payroll tech stack

Payroll software enables businesses to manage and streamline payroll processes, ensuring that employees are paid on time and in full. These systems assist human resource departments in automating payroll processes while accounting departments ensure accurate bookkeeping.

Additionally, these apps calculate wages, taxes, pre-and post-tax deductions and assist organizations in adhering to various state and federal tax and Social Security requirements.

| Helpful payroll tools for SMBs: ADP, Paylocity, or Rippling

Note: Not all solutions listed above directly integrate with SmartVault. To see our full list of integrations visit <https://www.smartvault.com/integrations/>

Tech stack examples for small businesses

To help you in your journey of choosing the right tech stack for your business, here's an example list of what apps could be part of it.

1 Finance

- [Quickbooks](#) for bookkeeping and invoicing
- [Paylocity](#) for payroll management
- [2Checkout](#) for payment processing
- [SmartVault](#) for storing invoices

2 Human Resources

- [BambooHr](#) for hiring, onboarding, compensation, and workforce management
- [Mirro](#) for performance management and retention
- [Udemy Business](#) for learning and development

3 Project Management

- [Trello](#) for planning
- [Toggl](#) for time tracking
- [LastPass](#) for login sharing
- [SmartVault](#) for file sharing

4 Marketing & Sales

- [ActiveCampaign](#) for emails and CRM
- Google Ads (and other types of ad platforms) for attracting visitors to your site or store
- [Google Analytics](#) to track what these visitors do on the website
- [Canva](#) to create banners
- [Calendly](#) for scheduling calls with clients

5 Operations

- [Google Workspace](#) for internal communication, emails, and many other tools.
- [Trello](#) for company-wide team planning
- [Zapier](#) to automate tasks

Remember, these are only general recommendations. Your organization may not need all these apps to function, or it may need more specific ones! It's essential to audit your business needs first choose the right tech stack after.



Key Takeaways: Evaluating New Systems for Your Tech Stack

Now that you've come all this way and hopefully learned a thing or two about building the right tech stack, here are the key takeaways that you should remember.

- Determine your business and department needs first.
- Audit your existing technology stack to determine what stays and what doesn't. The apps should determine the choice by:

Utility

Price

Integration potential

Scalability

- Research new relevant tools and stay up to date with the market.



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