

TOOLS AUDIT WORKSHEET

Grab the [spreadsheet](#) and inventory all your tools that meet the following:

#1. Paid tools that have a yearly or monthly fee (make sure to check your banking statements so you don't miss any)

#2. Tools you use on a daily/weekly basis that are free or paid for and done.

Ask yourself the following questions for each tool:

Using the below guidelines rank your satisfaction with each tool.

Make notes of any changes/answers you want to make note of.

Then assign each tool a Keep (K), Replace (R), Review Alternatives (A).

How satisfied am I with this service?

*Do I often find myself frustrated, saying "I wish it did _____" or have I created workarounds to hack it to do what I need?
[Make notes of this answer] If it's a free tool it might be time for an upgrade.*

*Are you using most of the features offered or do you use just a fraction?
[If just a fraction mark for review for a cheaper or possible downgrade in plans]*

Are there new features or integrations I'm not using?

*How often do I use this tool and is it worth the cost?
[If you use the tool very little, it may be worthwhile to search for a free or cheaper tool, or get rid of it all together]*

*Are there any new tools you think you should explore that would replace this tool?
[If yes mark for review]*

Tools marked A or R

- ☐ Check for renewal date (when applicable)
- ☐ Set calendar reminders for annual plans 15 days before renewal, if you want to keep until time to cancel or to re-evaluate alternatives.
- ☐ Cancel any tools you no longer use
- ☐ Research replacements:

Google alternatives to _____ (the tool you want to replace). OR cheaper than _____.

Entrepreneurial Facebook groups are also great places to find the greatest and latest tools on the market. You can search the group or you can start your own post.

Ongoing Actions

- ☐ Set a calendar reminder for your next tools audit in 6 months to 1 year
- ☐ Every time you purchase a new tool update your tools inventory sheet.

