Internal Systems and Tools for Scale

This printable worksheet provides considerations for internal systems and tools to support scale.

Overview

For any organization to function efficiently and scale effectively, having the right systems, technology, and tools in place from the beginning is critical. This worksheet provides a breakdown of key categories and recommended systems or tools that can help your organization scale effectively while optimizing productivity and efficiency. Note that your organization does not need all of these systems or tools at once.

Instead, focus on building a **minimal set of systems and tools** (called a **tech stack**) that supports your immediate needs, and then expand it as you grow. For example:

- Start with basic tools for **communication** (e.g., Slack, Email), **project management** (e.g., Notion, Asana), **cloud storage** (e.g., Google Drive, Microsoft SharePoint), and **finances** (e.g., QuickBooks, Paycor, ADP).
- As you begin to grow, add tools for **customer relationship management/CRM** (e.g., HubSpot, Salesforce), **email service provider/ESP** (e.g., HubSpot, Mailchimp), **customer support** (e.g., Intercom), and **productivity** (e.g., Zapier).

A thoughtful approach to your tech stack will save time, reduce manual errors, and give you the flexibility needed to grow efficiently.

Scaling Systems and Tools Checklist

The checklist below can serve as a **guide** for setting up the systems and tools you need for your enterprise. You can use this checklist to help you audit what systems and tools you are currently using and identify areas to potentially invest in. The checklist is organized into seven categories:

- Internal Communication, Collaboration & Productivity
- Sales & Marketing
- Customer Success & Support
- Analytics & Reporting
- Financial Management & Business Operations
- Technology Infrastructure & Data Security (if applicable)
- Fundraising & Grant Writing (if applicable)

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Within each category, there are subcategories with example tools. Note that these tools are not recommended above others. Instead, they are provided to help you research more about what tools like these can do to help an organization. You may have a different tool in place that serves your needs in each subcategory; you can add that tool to the bullet with a blank line. You can use the space in the Notes column to prioritize any next steps related to the tools provided.

Internal Communication, Collaboration & Productivity	Notes
Internal Communication ● Slack ● Microsoft Teams/Google Chat ● _____ **Project Management** ● Trello / Asana / ClickUp ● Notion / Monday.com ● _____ **File Sharing & Cloud Storage** ● Google Workspace (Google Drive) ● Microsoft SharePoint ● _____ **Productivity & Workflow Automation** ● Zapier (workflow automation) ● Airtable (customizable spreadsheet/database) ● _____	

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Sales & Marketing	Notes
Customer Relationship Management (CRM) ● HubSpot CRM ● Salesforce ● _____ **Email Marketing** ● Mailchimp ● ActiveCampaign/SendinBlue ● _____ **Social Media Management** ● Buffer/Hootsuite ● Canva (for design) ● _____ **Lead Generation & Sales** ● LinkedIn Sales Navigator ● ZoomInfo (B2B database) ● Calendly (for scheduling) ● _____	

Analytics	Notes
Website traffic ● Google Analytics ● _____ **User behavior tracking** ● Mixpanel / Amplitude ● _____	

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Reporting	Notes
Custom reporting ● Looker Studio (custom reporting) ● _____	

Customer Success & Support	Notes
Customer Support & Engagement ● Intercom (live chat and automation) ● Zendesk (help desk and support) ● Freshdesk (customer service solution) ● _____ **Field Service Management (Training and PD)** ● Skedulo ● Jobber ● Salesforce Field Service ● _____	

Financial Management & Business Operations	Notes
Accounting Software • QuickBooks • Xero • Wave (free option) • _____ **HR, Benefits & Payroll Management** • Gusto • BambooHR • _____ **Expense Management** • Expensify • Brex/Ramp • _____ **Payments & Invoicing** • Stripe • PayPal/Square • _____ **Legal & Compliance Tools** • DocuSign / HelloSign (e-signature) • Clerky (legal paperwork management) • _____	

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Technology Infrastructure & Data Security	Notes
Software Development: Cloud Hosting & Servers ● Amazon Web Services (AWS) ● Google Cloud Platform (GCP) ● _____ **Software Development: Version Control** ● GitHub/GitLa ● _____ **Software Development: Continuous Integration/Continuous Deployment (CI/CD)** ● Jenkins ● CircleCI ● Travis CI ● _____ **Cybersecurity & Data Protection** ● Cloudflare (website security) ● NordVPN Teams / Perimeter 81 (VPN services) ● _____	_Only needed if product is tech-based._

Fundraising & Grant Writing	Notes
Fundraising ● Carta (equity and cap table management) ● Visible (investor relations) ● Gust (capital raising) ● _____ **Grant Writing** ● Good Grants ● AmpliFund ● Submittable ● _____	*Only applicable in some contexts.*