FROM THE MAP, TRIAGE, HOLD FRAMEWORK

Inherited Stack Audit Checklist

MAP Build an honest inventory of what is in your stack.

Build an honest inventory of what is in your stack. Two of the three passes live here, the tools and the AI. Fill it in. A cell you cannot fill is itself a finding.

Pass 1. Tool inventory. One row per system. What it does today, not what it was bought for.

Tool	Job today	Owner	Who pays	Who uses it	Status	Connects to	Risk

Filled example: Marketing platform · email, forms, nurture, lead capture · owner marketing ops · paid by marketing · used by marketing and SDRs · active · connects to CRM, ads, webinar tool · risk: two-way CRM sync, direction unclear.

Pass 2. AI surface census. Go through the settings of every tool. One row per live AI feature.

Where it lives	Feature	On by default?	Data it touches	Owner	Reviewed?	Risk

Filled example: CRM · AI lead scoring · on by default · all contact and activity data · owner: none · reviewed: no · risk: scores feed routing, unchecked.

Red flags. Check any you find.

- ☐ Two tools doing the same job, bought by different teams.
- ☐ A tool no one has logged into in ninety days.
- ☐ An integration no one can explain.
- ☐ The same field filled differently by two teams.

▢ An AI feature that is on and no one remembers enabling.

▢ Admin access far wider than the work requires.

▢ A record two systems both claim to own.

▢ Automations with no owner and no documentation, touching routing or scoring.

Done when.

▢ You can name every tool and the job it actually does.

▢ You can name every live AI feature and whether it was a choice or a default.

▢ A new hire could understand the stack from what you wrote.

▢ It lives somewhere it can be kept current.