

The Stack Health Check

START HERE Score your stack in six or seven minutes and find where to begin.

Score your stack before you touch it. Six areas, twenty-four questions, five to seven minutes. For each one, mark a single answer. You get a number out of 100, a band, and the two or three areas to start on.

Visibility: do you actually know what you have?

1. I have a current, written inventory of every tool in our marketing and sales stack, and what each one is for.

☐ Not true (0) ☐ Somewhat (1) ☐ Mostly (2) ☐ Fully (3)

2. I have a map of how customer and lead data moves between our core systems.

☐ Not true (0) ☐ Somewhat (1) ☐ Mostly (2) ☐ Fully (3)

3. I can list every place AI is currently active in our stack, including features built into tools we already pay for.

☐ Not true (0) ☐ Somewhat (1) ☐ Mostly (2) ☐ Fully (3)

4. A new hire could understand how our stack fits together from documentation, without shadowing me for a week.

☐ Not true (0) ☐ Somewhat (1) ☐ Mostly (2) ☐ Fully (3)

Data and sync integrity: can you trust the records?

5. Records stay consistent between our CRM and marketing platform without routine manual cleanup.

☐ Not true (0) ☐ Somewhat (1) ☐ Mostly (2) ☐ Fully (3)

6. We have a working approach to duplicates, and duplicates are the exception.

☐ Not true (0) ☐ Somewhat (1) ☐ Mostly (2) ☐ Fully (3)

7. Field mappings between systems are documented, and I know what breaks if one changes.

☐ Not true (0) ☐ Somewhat (1) ☐ Mostly (2) ☐ Fully (3)

8. When data looks wrong, I can trace where it came from rather than guessing.

☐ Not true (0) ☐ Somewhat (1) ☐ Mostly (2) ☐ Fully (3)

Lifecycle and routing: does flow work without leaks?

9. Every inbound lead has a defined path and a clear owner, from first touch to handoff.

☐ Not true (0) ☐ Somewhat (1) ☐ Mostly (2) ☐ Fully (3)

10. Our scoring or qualification logic reflects how the business defines a good lead today, not a year ago.

☐ Not true (0) ☐ Somewhat (1) ☐ Mostly (2) ☐ Fully (3)

11. Leads do not sit unrouted or get stuck between marketing and sales.

☐ Not true (0) ☐ Somewhat (1) ☐ Mostly (2) ☐ Fully (3)

12. I could explain, end to end, what happens to a lead from form fill to closed deal.

☐ Not true (0) ☐ Somewhat (1) ☐ Mostly (2) ☐ Fully (3)

Measurement and attribution: can you defend the numbers?

13. I could defend our attribution numbers if finance or leadership challenged them tomorrow.

☐ Not true (0) ☐ Somewhat (1) ☐ Mostly (2) ☐ Fully (3)

14. Marketing and sales agree on how core terms like a qualified lead or an opportunity source are defined.

☐ Not true (0) ☐ Somewhat (1) ☐ Mostly (2) ☐ Fully (3)

15. Our reporting reconciles across systems, rather than each tool telling a different story.

☐ Not true (0) ☐ Somewhat (1) ☐ Mostly (2) ☐ Fully (3)

16. I trust our numbers enough to make budget decisions on them.

☐ Not true (0) ☐ Somewhat (1) ☐ Mostly (2) ☐ Fully (3)

AI control: do you control the AI in your stack?

17. I can name every AI feature live in our stack and who is accountable for each one.

☐ Not true (0) ☐ Somewhat (1) ☐ Mostly (2) ☐ Fully (3)

18. I know what customer or prospect data each active AI feature can read, write, or send out.

☐ Not true (0) ☐ Somewhat (1) ☐ Mostly (2) ☐ Fully (3)

19. Something or someone reviews AI-generated output before it reaches a customer or a record of decision.

☐ Not true (0) ☐ Somewhat (1) ☐ Mostly (2) ☐ Fully (3)

20. New AI features get a deliberate yes or no before they are switched on, rather than arriving on by default.

☐ Not true (0) ☐ Somewhat (1) ☐ Mostly (2) ☐ Fully (3)

Governance and ownership: will it stay clean?

21. Nothing new gets added to the stack, a tool or a feature, without passing a basic intake step.

☐ Not true (0) ☐ Somewhat (1) ☐ Mostly (2) ☐ Fully (3)

22. Every core part of the stack has a named owner responsible for it.

☐ Not true (0) ☐ Somewhat (1) ☐ Mostly (2) ☐ Fully (3)

23. Key processes and configurations are documented well enough to survive someone leaving.

☐ Not true (0) ☐ Somewhat (1) ☐ Mostly (2) ☐ Fully (3)

24. We review the health of the stack on a regular cadence, not only when something breaks.

☐ Not true (0) ☐ Somewhat (1) ☐ Mostly (2) ☐ Fully (3)

Score it. Dimension score is the sum of its four answers divided by 12, times 100. Overall score is the average of the six. Bands apply to the overall and to each dimension, so one weak area shows even when the average looks fine.

Score	Band	What it means
0 to 40	Flying blind	High risk. Things are failing where you cannot see them.
41 to 60	Holding together	It works, but it is fragile, and drift is winning.
61 to 80	In control	Solid. The gaps are manageable.
81 to 100	Compounding	The stack is an asset, not a liability.

Start with your worst two or three. Each points to a step and the tool that fixes it.

Weak area	Step	Tool to use
Visibility	Map	Inherited stack audit checklist, data flow map
Data and sync integrity	Triage	Sync and data hygiene audit
Lifecycle and routing	Triage	Lifecycle and routing audit
Measurement and attribution	Triage	Attribution integrity check
AI control	Map and Hold	AI surface census, intake one-pager, AI output QA checklist
Governance and ownership	Hold	Intake one-pager, decision rights and RACI, vendor scorecard, due diligence question bank