



2. Your Tech Tool Audit

What tools are currently in your toolkit, and are they helping your goals or holding you back?

Category	Tool You're Using	Love it?	Needs Upgrade?
Scheduling	_____	<input type="radio"/>	<input type="radio"/>
Email Marketing	_____	<input type="radio"/>	<input type="radio"/>
Website/Storefront	_____	<input type="radio"/>	<input type="radio"/>
Social Media	_____	<input type="radio"/>	<input type="radio"/>
File Storage	_____	<input type="radio"/>	<input type="radio"/>
Notes/Ideas	_____	<input type="radio"/>	<input type="radio"/>

3. Your “Must-Have” Tools List

Write down the five tools you plan to keep using—or learn to use more effectively.

Purpose	Tool	Reason I Chose It
1.		
2.		
3.		
4.		
5.		

4. Action Mission: Upgrade One Tech Area This Week

Choose a weak link in your tech stack and commit to one upgrade.



WORKSHEET #2

TECH TOOLS EVERY ENTREPRENEUR SHOULD MASTER

Use this worksheet to identify the most important tech categories in your business and pinpoint areas where upgrades are needed.

1. Essential Tech Tool Categories Checklist

Check off areas where you already use tools and star where you need better options/upgrades.

- Communication (e.g., Slack, Zoom, Google Meet)
- Project Management (e.g., Trello, Asana, ClickUp)
- File Storage and Sharing (e.g., Google Drive, Dropbox, OneDrive)
- Scheduling and Booking (e.g., Calendly, Acuity)
- Email Marketing (e.g., Mailchimp, ConvertKit, Brevo)
- Social Media Management (e.g., Buffer, Hootsuite, Later)
- Automation (e.g., Zapier, Make/Integromat, IFTTT)
- Finance/Accounting (e.g., QuickBooks, Wave, FreshBooks)
- Customer Relationship Management (CRM) (e.g., HubSpot, Zoho, Keap)

2. Tool Matchmaker: Pair Your Needs with Solutions

Match a business need or bottleneck with a tool you want to try.

My Need	Recommended Tool(s)	Will You Try This Tool?
		<input type="radio"/>
		<input type="radio"/>
		<input type="radio"/>
		<input type="radio"/>
		<input type="radio"/>



3. Quick Tech Wins for the Week

Pick ONE tool to test or improve this week:

This week, I will try:

I want it to help me with:

I will evaluate it on:
