Daydream Built

SAMPLE DELIVERABLE · TECH STACK AUDIT

Tech Stack Audit

A sample of what you get from a Discovery audit: a clear, written look at what you're paying for, what overlaps, and the simplest path to a calmer, cheaper stack.

This is an anonymized example for a fictional business, "Sample Co," a small online shop run by two people. The shape, the depth, and the kind of recommendations are exactly what a real audit looks like. Yours would be specific to your tools, your numbers, and how you actually work.

What you're spending now

Seven subscriptions, several doing overlapping jobs, with data re-entered by hand between them.

Tool	What it's for	Monthly
All-in-one CRM + projects	Contacts, tasks, light docs	$99
Email marketing platform	Newsletters, automations	$85
Analytics / dashboard add-on	Reports you rarely open	$76
Automation service (premium)	Connecting the other apps	$50
Standalone scheduling app	Booking calls	$40
Online form builder	Intake and surveys	$35
Extra cloud storage tier	Files, mostly unused	$25
Total	**7 tools**	**$410**

What I'd change

- **Keep:** the email marketing platform. You use it well, and it earns its cost.
- **Consolidate:** the CRM, project tasks, intake forms, and scheduling all overlap. Move them into one operational hub (an Airtable base) that the two of you actually open day to day, so nothing is entered twice.
- **Cut:** the premium automation tier (the hub removes most of those connections), the analytics add-on (a built-in dashboard covers it), and the extra storage you're not using.
- **Replace:** the standalone scheduler with the booking view built into the hub, so a booked call lands next to the contact it belongs to.

The recommended stack

Three subscriptions instead of seven, with one place to look.

Tool	What it does now	Monthly
Operational hub (Airtable)	Contacts, tasks, intake, scheduling, the single source of truth	$54
Email marketing platform	Kept, and connected to the hub so lists stay current	$85
Right-sized automation	The few connections you still need	$41
Scheduling, forms, storage, reports	Folded into the hub or onto free tiers	$0
Total	**3 tools**	**$180**

Where to start

In priority order, so the biggest relief comes first:

1. Stand up the Airtable hub and move contacts, tasks, and intake into it. This is the single change that removes the most double-entry.
2. Point your forms and booking at the hub, so a new lead or call shows up in one place.
3. Right-size the automation tier once the hub has removed most of the old connections.
4. Drop the analytics add-on and the extra storage, and use the free tiers you already have.

5. Connect your email platform to the hub so your lists stay current on their own.

What this would mean

Your monthly tool spend drops from $410 to about $180, a saving of roughly $230 a month (about $2,760 a year). Just as important, you go from seven places to look to one, with no more copying the same detail between apps. At $400, a Discovery audit like this pays for itself in under two months.

Daydream Built: operational systems for small businesses

A trade name of Daydream Made LLC

hello@daydreambuilt.systems · Instagram @daydream_built

This is a sample for illustration. Your real audit is specific to your business, and the figures here are fictional. Nothing here is an offer or a binding contract.