

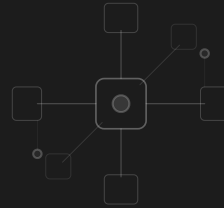
# The Wiring: Tech Stack

THE 50 FACTOR — GROWTH FACTOR #47

## Your Tech Stack at Scale

The Complete Implementation Guide

BY SCOTT SCULLY



### Growth Factor #47: Your Tech Stack at Scale

#### The Complete Implementation Guide

*This white paper is a companion to Chapter 47 of The 50 Factor by Scott Scully. The book tells the story. This guide gives you the five-step cleanup framework to eliminate tech debt, integrate your systems, and build the leadership dashboard that lets you see the whole business on one screen.*

#### Why This Growth Factor Matters

Tech tools accumulate like barnacles. Each one made sense when it was added — a project management tool here, a communication platform there, a reporting dashboard on top, a standalone CRM, a separate invoicing system, three different file-sharing solutions because three different departments made three different choices.

At \$10M, the fragmentation is annoying. At \$30M, it's crippling. Data lives in silos. Manual processes bridge the gaps between systems. Reports take hours to assemble because the information comes from five different tools. The leadership team makes decisions based on stale data because nobody has built the pipeline to surface it in real time.

The fix isn't buying more tools. The fix is consolidation, integration, and a single source of truth — with the CRM as the center of everything.

# The Three Layers of a Scaled Tech Stack

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## Layer 1: System of Record (CRM)

The CRM is the center of your operating world. Every client, every deal, every interaction, every revenue number lives here. Salesforce, HubSpot, or equivalent — the specific platform matters less than the discipline of making it the single source of truth.

When the CRM is clean and complete, every question has one answer. "How many active clients do we have?" One number, from one system, trusted by everyone. "What's our pipeline coverage for Q2?" One report, from one system, updated in real time. "Who's the AM for the Henderson account?" One record, from one system, accurate right now.

When the CRM is dirty — duplicate records, missing data, inconsistent fields, outdated contacts — every question has multiple answers, and nobody trusts any of them. The leadership team spends meeting time debating the data instead of making decisions.

## Layer 2: Workflow Tools

The tools that do the work: project management (Asana, Monday, Jira), communication (Slack, Teams), document management (Google Drive, SharePoint), quality scoring (your scorecard system), invoicing (QuickBooks, NetSuite), and any vertical-specific tools for your industry.

The rule: one primary tool per function. Not three project management tools because three departments chose independently. One tool, chosen deliberately, adopted company-wide.

Every workflow tool must integrate with the CRM. When a deal closes in the CRM, the project management tool auto-creates the implementation project. When a quality score is logged, the scorecard data flows back to the client record. When an invoice is paid, the financial data updates. No manual handoffs. No copy-paste between systems. Integration eliminates the human error and time waste that fragmented tools create.

## Layer 3: Intelligence Layer

One dashboard. Five to ten numbers. Auto-updated daily. Visible to the leadership team every morning.

The dashboard shows the numbers that matter most: the Growth Formula metrics (Principle #4), the weekly financial snapshot (Principle #41), A-Player Score averages by team, quality scores by function, client retention, and pipeline coverage. Everything the CEO needs to know about the health of the business — on one screen, current as of this morning.

Building this dashboard is the final step — it requires clean CRM data (Layer 1) and integrated workflows (Layer 2) to populate automatically. Without the underlying infrastructure, the dashboard is either manual (hours of assembly per week) or inaccurate (stale data from disconnected systems). With the infrastructure, it's effortless and trustworthy.

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# The Five-Step Cleanup

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## Step 1: Audit

List every tech tool in the company. For each one: who uses it, what it does, what it costs per month, and whether it integrates with the CRM. Most companies discover they have 15-25 tools, of which 5-8 are redundant, 3-5 have zero integration, and 2-3 are unused but still being billed.

## Step 2: Consolidate

One primary tool per function. If sales uses HubSpot and marketing uses Mailchimp and client success uses Intercom — that's three communication platforms. Pick one. Migrate. Cancel the others.

The consolidation conversation is politically charged because each department chose their tool and feels ownership over it. The decision-making framework: which tool integrates best with the CRM, scales with the company's growth, and serves the most users? The answer usually picks itself.

### Step 3: Fix the CRM

This is the hardest step and the most valuable. CRM cleanup means: merging duplicate records, standardizing field definitions (what does "active client" mean — and does everyone use the same definition?), automating data capture (reduce manual entry), building workflows (when a deal moves to "closed-won," what happens automatically?), and training every user on the standards.

CRM cleanup is not a one-time project. It's an ongoing discipline. After the initial cleanup, assign ownership: someone is responsible for data quality, field standards, and user compliance. At \$30M+, this is the RevOps hire (see below).

### Step 4: Build Integrations

Map every handoff between systems. For each one: can it be automated? The deal-to-onboarding handoff (CRM → project management), the delivery-to-invoicing handoff (project management → billing), the quality-score-to-scorecard handoff (scoring tool → CRM). Every manual handoff is a point of failure — data gets dropped, delayed, or entered incorrectly. Automation eliminates the failure points.

### Step 5: Build the Leadership Dashboard

One screen. Five to ten numbers. Auto-updated. The dashboard is the capstone of the entire tech stack — it's where the clean data from Layer 1, the automated workflows from Layer 2, and the integrated intelligence converge into a real-time view of the business.

Start simple: revenue (MTD vs. plan), pipeline coverage, A-Player Score average, quality score average, retention rate, cash position. Add complexity over time as the data infrastructure matures.

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## The RevOps Hire

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At \$30M+, hire one person who owns the entire tech stack: integrations, data quality, CRM administration, workflow automation, and the leadership dashboard. Revenue Operations (RevOps) is one of the most leveraged hires you'll make at this stage.

The RevOps person doesn't build systems from scratch — they optimize and connect the systems you already have. They eliminate the manual workarounds, automate the handoffs, enforce the data standards, and build the reporting infrastructure that lets the leadership team make decisions based on current, accurate data instead of stale spreadsheets.

Without RevOps, the tech stack drifts. Tools accumulate. Integrations break. Data quality degrades. Reports take hours to assemble. With RevOps, the tech stack is a machine — maintained, optimized, and continuously improved.

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## The Software Vetting Checklist

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Before purchasing any new tool, run it through seven questions:

1. What specific problem does it solve? 2. What measurable outcome do we expect within 90 days? 3. How will we track whether it's working? 4. Who owns adoption and administration? 5. Have we demoed at least 3 alternatives? 6. Is the vendor stable (funded, growing, not likely to disappear)? 7. Maximum 1-year initial contract (so you can exit if it doesn't deliver)?

If the tool can't clear all seven questions, don't buy it. Every tool you add without a clear thesis becomes tech debt — an ongoing cost with no measurable return.

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## Common Mistakes and How to Avoid Them

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**Mistake #1: Adding tools instead of consolidating.** Every new tool adds complexity. The question before any purchase: can an existing tool do this with a configuration change?

**Mistake #2: Dirty CRM.** If the CRM data is wrong, every dashboard, report, and decision based on it is wrong. CRM hygiene is not optional — it's foundational.

**Mistake #3: No integration strategy.** Tools that don't talk to each other create data silos. Every tool should integrate with the CRM, or it doesn't belong in the stack.

**Mistake #4: Building the dashboard before fixing the data.** A dashboard built on dirty data creates the illusion of visibility. Fix Layers 1 and 2 before building Layer 3.

**Mistake #5: No RevOps ownership.** Without someone who owns the tech stack, entropy wins. Tools accumulate, integrations break, data quality degrades.

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## Quick-Start Checklist

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- ✓ ☐ Complete the tech audit: every tool, every cost, every user, every integration status
  - ✓ ☐ Identify and eliminate 3-5 redundant tools this quarter
  - ✓ ☐ Launch CRM cleanup: dedup records, standardize fields, build workflows
  - ✓ ☐ Map every manual handoff between systems — prioritize the top 5 for automation
  - ✓ ☐ Build the leadership dashboard with 5-10 auto-updating metrics
  - ✓ ☐ Hire or designate the RevOps person
  - ✓ ☐ Use the software vetting checklist for every future purchase
  - ✓ ☐ Review the tech stack quarterly — consolidation is ongoing, not one-time
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## Implementation Tools

Ready-to-use templates for this Growth Factor

XLSX

### Tech Stack Audit Template

Columns: Tool, Function, Users, Monthly Cost, Integrates w/ CRM?, Redundant?, +1 more

PDF

### CRM Cleanup Checklist

Dedup, standardization, workflow automation steps

XLSX

### Integration Map Template

Columns: Team Member, Calls Made (25%), Conversations (35%), Meetings Booked (30%), Discovery Quality (10%), Daily Score

PDF

### Leadership Dashboard Specification

10 recommended metrics with data sources

PDF

### Software Vetting Checklist

7 questions before any purchase

*This is Growth Factor #47 of 50. The tech stack is the nervous system of the company — it connects every function, every metric, and every decision. When the nervous system is healthy (clean data, integrated tools, real-time visibility), the company moves fast and makes good decisions. When it's fragmented (dirty data, siloed tools, stale reports), the company stumbles in the dark.*

*Get the book: The 50 Factor by Scott Scully*

## The Cost of Doing Nothing

Most founders look at a tech stack audit and think: "This is a lot of work. We'll get to it later." Here's what "later" costs you:

Every manual handoff between systems costs 5-15 minutes per occurrence. If your team performs 50 manual handoffs per day across the company — copying data from CRM to project management, updating spreadsheets from billing reports, assembling the weekly snapshot from four different tools — that's 250-750 minutes per day of human labor spent on work a computer should do. That's 4-12 hours per day. That's the equivalent of 1-2 full-time employees doing nothing but moving data between systems.

The cost isn't just time. It's accuracy. Every manual handoff is a point of failure — data gets dropped, transposed, delayed, or entered incorrectly. The leadership dashboard that took 3 hours to assemble and contains one data entry error produces a worse decision than the dashboard that auto-updates in real time with zero errors.

The companies that invest in tech stack consolidation and integration recover the investment within 6-12 months through time savings alone. The accuracy improvement and decision-making speed improvement are additional returns that compound forever.

The dashboard isn't just a reporting tool — it's a decision-making accelerator. When the leadership team walks into the weekly meeting and the dashboard shows Revenue MTD (green), Pipeline Coverage (yellow), A-Player Score Average (green), Quality Score (red), Retention (green), Cash Position (green) — the meeting agenda writes itself. Skip the green. Discuss the yellow. Deep-dive the red. The dashboard turns a 90-minute meeting of status updates into a 45-minute meeting of decisions. That time savings — compounded over 50 weeks per year — gives the leadership team back hundreds of hours for strategic work.

## The Hidden Cost of Manual Handoffs

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Every manual handoff between systems costs 5-15 minutes and introduces an error risk. If your team performs 50 manual handoffs per day across the company — copying data from CRM to project management, updating spreadsheets from billing reports, assembling the weekly snapshot from four different tools — that's 250-750 minutes per day. The equivalent of 1-2 full-time employees doing nothing but moving data between systems.

The cost isn't just time — it's accuracy. Every manual transfer is a point of failure. The leadership dashboard that took 3 hours to assemble and contains one data entry error produces a worse decision than the dashboard that auto-updates in real time with zero errors. Integration isn't a nice-to-have at \$30M+. It's the infrastructure that makes data-driven decision-making possible.