Business Tech Audit

The Keep, Cancel, or Automate Decision Matrix

User Guide

For questions or support, contact: ✉ denise@denisemaplesva.com, 🌐 www.denisemaplesva.com

1. Overview

The Business Tech Audit Matrix is a standard-alone, offline tool that helps you make clear decisions about every piece of software your business uses. There are no subscriptions, no logins, and no data sent anywhere — everything stays in your browser.

The matrix is divided into three columns:

1. The Keep Column	2. The Cancel Column	3. The Automate Column
Essential, high-ROI & used daily	Redundant, over-hyped & unused	Repetitive, time-consuming tasks
List tools your team relies on every day. Confirm each one is essential and enter its monthly cost.	List tools to cancel. Flag duplicates and stale logins. Track the monthly savings you'll recover.	Map out manual tasks to automate. Define the trigger and result, and estimate hours saved per week.

A live summary bar at the bottom tracks your totals across all three columns as you type.

2. Getting Started

Opening the tool

1. Locate the file **business-tech-audit.html** on your computer.
2. Double-click the file. It will open automatically in your default web browser (Chrome, Firefox, Safari, or Edge).
3. No installation is required. The tool works entirely offline.

Note: An internet connection is only used to load the display font on first open. The tool is fully functional without it.

3. The Keep Column

Purpose

Use this column to list every software tool your team currently uses that is worth keeping — tools that are essential, actively used, and delivering clear value.

How to use it

- Each tool gets its own card. The first two cards are pre-filled with examples (Slack and Gmail). Edit or delete these to match your own stack.
- Click “+ Add tool” to add as many tools as you need.
- Click the × button on any card to remove it.

Field	What to enter
Software name	The name of the tool (e.g. Slack, HubSpot, Notion).
$/month	The monthly cost of the tool. Enter the number only, without the dollar sign.
Confirmed essential	Check this box once you have decided the tool is worth keeping. Only checked tools count toward the Keep pill in the summary bar.

Why keep it? (radio buttons)

Select one reason that best describes why the tools in this column are essential:

- Critical to core workflow — the tool is central to how the business operates (e.g. a CRM or project management tool).
- Generates direct revenue — the tool directly enables sales, billing, or customer delivery.
- Team adoption rate > 90% — nearly everyone on the team uses it regularly.
- None of the above — select this if the tools are kept for another reason, and reconsider whether they belong in the Cancel column instead.

---

4. The Cancel Column

Purpose

Use this column to list tools you plan to cancel. Every tool here has a cost you can stop paying — whether it’s a duplicate, abandoned, or simply not worth the subscription.

How to use it

- Click “+ Add tool to cancel” to add a new entry.
- Click the × button to remove any entry.
- The total monthly savings calculate automatically as you fill in costs.

Field	What to enter
Tool name	The name of the tool you are cancelling.
$/month	The monthly cost of the tool. This feeds directly into the total savings calculation.
Duplicate tool	Check this if you already have another tool that does the same job (e.g. both Trello and Asana).
Last login > 60 days	Check this if no team member has logged in within the past 60 days. When checked, a date field appears so you can record the exact last login date for reference.

Tip: Before cancelling, check whether the tool is on an annual plan. You may need to wait until renewal to avoid a cancellation fee. Export your data from the tool first.

---

5. The Automate Column

Purpose

Use this column to identify repetitive, manual tasks that could run automatically using tools like Zapier, Make (formerly Integromat), or a custom API integration. The goal is too free up your team's time for higher-value work.

How to use it

- Click "+ Add automation task" to add a new task.
- Click the × button to remove any task.
- The total hours saved per week calculate automatically across all tasks.

Field	What to enter
Action — what triggers it?	Describe the event that starts the automation (e.g. "a new lead submits the contact form").
Result — what happens next?	Describe what should happen automatically as a result (e.g. "send a personalized intro email").
Hours saved / week	Estimate of how many hours per week this automation will save. Use 0.5 for half an hour.

Example: Action: "New client added to CRM" → Result: "Create onboarding task in project management tool" → 0.5 hours/week saved.

---

6. The Summary Bar

The summary bar runs along the bottom of the tool and updates in real time as you fill in the matrix. It shows three pills:

Pill	What it tells you
Keep: X tools	Number of tools you've confirmed as essential.
Cancel: $X/month saved	Total monthly cost of all tools in the Cancel column.
Automate: X hours/week	Total hours per week saved across all automation tasks.

These numbers give you a quick snapshot of your audit results without needing to tally anything manually.

---

7. Exporting Your Results

Export CSV

Click the “Export CSV” button to download a spreadsheet file containing all your entries across the three columns. The file can be opened in Microsoft Excel, Google Sheets, or any other spreadsheet application.

The CSV includes the following columns:

- Section — KEEP, CANCEL, or AUTOMATE
- Name / Task — the tool name or automation description
- Monthly Cost ($) — the cost entered for each tool
- Notes — flags such as “Duplicate” or “Login >60 days” for Cancel entries, and hours saved for Automate entries

Print or Save as PDF

Click the “Print / Save PDF” button to open your browser’s print dialog. From there you can:

- Print a physical copy of the audit on paper.
- Save a PDF by selecting “Save as PDF” (or “Microsoft Print to PDF” on Windows) as the printer destination.

Note: When printing, the edit buttons and add/remove controls are automatically hidden so the printed version shows only your data in a clean layout.

---

8. Tips for Getting the Most Out of This Tool

- Run this audit quarterly. Software costs creep up over time — a 90-day review cycle catches waste before it compounds.
- Pull your billing statements before you start. Having the actual monthly costs in front of you makes the Cancel column much faster to complete.
- Check admin dashboards for login data. Most SaaS tools (Google Workspace, Slack, Microsoft 365) have an admin panel showing last login dates per user.
- Start with the Cancel column. Identifying waste first puts you in the right mindset to critically evaluate everything else.
- Be conservative with automation hours. It is better to underestimate time savings and be pleasantly surprised than to overcommit on automation scope.
- Share the CSV with your team or accountant. The exported file is a clean record of your tech stack decisions and the savings you have identified.

---

9. Frequently Asked Questions

Does the tool save my data automatically?

No. The tool does not save data between sessions. When you close the browser tab, your entries are cleared. Export your results as a CSV or PDF before closing if you want to keep a record.

Can I use this tool on a phone or tablet?

Yes. The tool is responsive and will adapt to smaller screens. On very small screens the three columns will stack vertically. For the best experience, a laptop or desktop is recommended.

Does this tool require an internet connection?

No. Once the file is on your computer it works fully offline. The only optional internet use is loading the display font on first open, which does not affect functionality.

How many tools can I add to each column?

There is no limit. You can add as many entries as you need to each column using the “+ Add” buttons.

Can I share this tool with my team?

Yes. Simply share the .html file directly (via email, Slack, a shared drive, etc.). Each person who opens it gets their own independent session. There is no shared or synced data between users.

I hope you found this tool helpful in your business.
~ Denise