

Tech Selection Builder.

Now that you've identified opportunities to improve your tech stack, you can use the below table to define your technology requirements. Consider the future of your business and your ideal client persona. This will help you select the right new technology.

[illegible]

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Use this side as a guide for your technology sales calls. Send them your specific questions, keeping in mind your research responses, to make your demo/introductory sales calls productive and efficient. If you need help finding technologies to compare, utilize [SEI's Strategic Partners](#) page or the Kitces.com Tech Directory/Tech Stack Builder.

	TECH #1	TECH #2	TECH #3
AVERAGE RATING (use surveys & read reviews)			
YEARS IN BUSINESS (where do you see yourself in 5 years)			
INTEGRATION(S)			
DATA SECURITY/STABILITY (cloud, personal server)			
ANY TRAINING/SUPPORT? (onboarding and data migration)			
COST/TERM/COMMITMENT			
FEATURE(S) & FUNCTIONALITY (prioritize and list your top 5 requirements from the reverse side)			
NOTES			

