



Use this worksheet to evaluate and select the right tools for your business stack. Complete each section before making a final decision.

## 1. Business Goal

Define the primary objective for adding or replacing a tool (e.g., improve SEO, streamline CRM).

## 2. Current Tools Audit

List existing tools and note any overlaps or redundancies.

## 3. Compatibility Check

Confirm compatibility with your CMS, hosting, and other plugins.

## 4. Trial Notes

Record observations during trial: ease of use, performance, support quality.

## 5. KPI Metrics

Define measurable outcomes (e.g., CWV scores, lead conversions, time saved).

## 6. Final Decision & Next Steps

Summarize decision, implementation plan, and training needs.