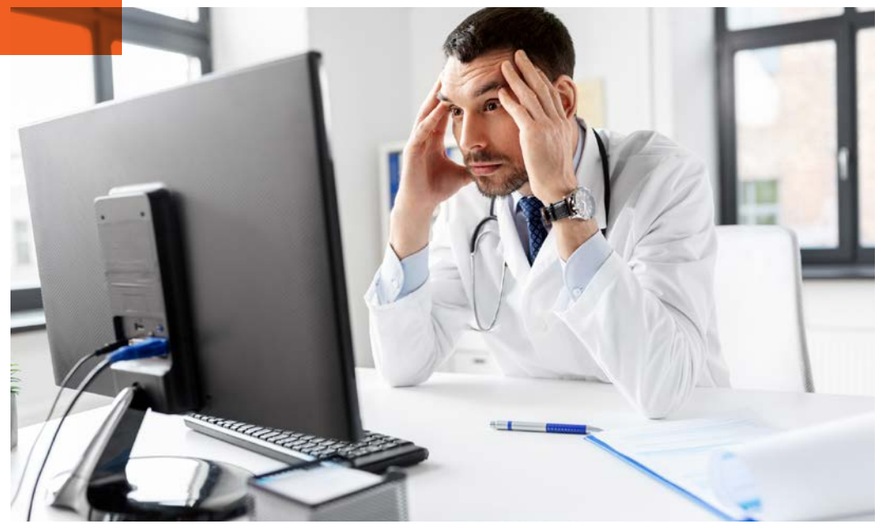

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INSIDE:

"Doctors and technicians know which tools reduce friction and which shift it elsewhere."

INNOVATION STATION

How to Audit Your Tech Stack in 90 Minutes

A hands-on exercise to find the overlaps, gaps, and wasted spend hiding in your software.

BY ADAM WYSOCKI

Most practices have never audited their software. They've accumulated it. A practice management system came first. Then a client communication tool, because the reminders in the PIMS were not quite enough. Then a payment platform, an online pharmacy, appointment scheduling software on the website, a lab integration, a review service, and — sometime in the last 18 months — an AI scribe, which began as a free trial but quietly converted to a paid plan.

None of it was designed as a system. It grew one decision at a time, each one reasonable on its own, until the practice was running eight or 10 separate tools that no one ever looked at together.

The cost of an unmanaged stack is mostly invisible. It hides in monthly charges small enough that nobody questions them, in modules you pay for and have never turned on, and in the staff time spent moving information by hand between tools that were sold to you as "integrated." In many

practices, the integration layer is not software. It's a person — usually the practice manager — and that work doesn't show up on any invoice.

You can find — not fix — all of it in 90 minutes. The point of this exercise is not to solve every problem in one sitting. It's to put the whole stack on a single page so you can see what overlaps, what's missing, and what you are paying for that you don't use. Once it's visible, the decisions get easy.

Before You Start

Block 90 minutes in your calendar. The best time of year is December or January, before renewals stack up and the busy spring calendar gets full.

Get the right people in the room. At minimum, that means the person who signs the checks and someone who actually uses the software all day. An owner who hasn't touched the PIMS in two years will guess about what works. A technician or a front-desk lead will know. If you can only spare one person, make it the one closest to the daily workflow. Bring:

- A blank spreadsheet
- The last three months of bank and credit card statements
- A willingness to be honest

The statements matter more than people expect, because the distance between what you think you are paying for and what's leaving your account every month is where the first surprises live.

Minutes 0 to 15: Build the Map

Open the spreadsheet, and list every piece of software that touches the practice. One row per tool. For each software, capture:

- What it does
- What it costs per month
- Who on the team owns the relationship with that vendor
- When the contract renews

Work outward from the obvious. Start with the PIMS, the communication tool, and the payment processor, then look for the ones that hide. Read the card statements line by line, because that's where you'll find the subscription nobody remembers starting, the seat you're still paying for after someone left, and the trial that turned into a plan.

A tool that does a unique job your team relies on is earning its price.

Ask the team what they use that's not on your list, including the free tools and anything running on a personal login. A spreadsheet a technician built to track callbacks is part of your stack. So is the group text the staff uses to coordinate. Write it all down.

Don't evaluate anything yet. The only goal for these 15 minutes is a complete, honest inventory. Most practices are surprised by the length of the list, and seeing it in front of you is half the exercise.

Minutes 15 to 35: Find the Overlaps

Now go down the list, and look for any job that more than one tool is doing.

This is more common than it sounds. Reminders go out from the PIMS and from a separate communication platform. Two tools send appointment confirmations. You pay for online booking in a website plug-in and again inside the PIMS. Payments run through one processor at the front desk, but a different processor for appointment deposits and refill requests made via text message. Some practices find that they are paying for two products that do 90% of the same thing, because each was bought by a different person at a different time.

Every overlap is one of two problems: Either you're paying twice for the same capability, which is wasted spend you can cut, or the work is split across two tools, which means your team is maintaining both and reconciling between them. Both are worth flagging. Mark each overlap in the spreadsheet and note which tool you'd keep if forced to choose. You aren't canceling anything today. You're naming the redundancy out loud.

Minutes 35 to 55: Find the Gaps

Overlaps are about paying for too much. Gaps are the opposite, and they're usually more expensive.

A gap is not a missing piece of software. It's the manual work that happens in the seams between the tools you already own. Ask the team:

- Where in the day do you type the same information into a second system?
- Where do you export a file from one tool and load it into another?
- Where is there a sticky note, a whiteboard, a paper log, or a spreadsheet doing a job because no software does it cleanly?

Those answers are your gaps. The client whose details get entered once in the booking tool and again in the PIMS. The lab result that gets printed and re-attached by hand. The end-of-day report someone rebuilds in a spreadsheet because the system won't produce it. Each one is a place where a human is doing the work that two pieces of software were supposed to do between themselves.

This is the most important 20 minutes of the audit, because this cost never lands on a statement. It's paid in staff time, in errors, and in the burnout of the person who has become your integration layer. A tool that costs you nothing in fees can cost you an hour a day in re-entering data by hand.

Write down every gap. Next to each one, estimate how much time it takes per week. You're converting invisible labor into a number you can act on.

Minutes 55 to 75: Reconcile the Spend

Go back to the statements and put a real dollar figure next to every tool on the map. Total it. The number is usually higher than the practice expects.

Then, look harder at three things:

- **Costs that climb as you grow:** Many tools charge based on how many staff members use them or how much you use them, so the bill rises a little every time you add a person or pick up volume, usually without anyone renegotiating the price.
- **The modules and add-ons you pay for and never use:** These are the features that sounded good in the demo, but were never switched on.
- **Integration and connection fees:** These are the charges that exist specifically to let two tools talk to each other. This deserves a hard look, because it's money you're paying to solve a problem the products created by not connecting in the first place.

Set each tool's cost against what you learned in the overlap and gap blocks. A tool that does a unique job your team relies on is earning its price. A tool that overlaps another, or that needs an hour of manual work a day to be useful, is not, no matter how small the invoice looks.

Minutes 75 to 90: Turn It Into a One-Page Plan

You now have everything you need. The last 15 minutes are about converting findings into action.

Don't try to fix everything. Pick the three to five items that matter most, and write them as specific next steps, each with one owner and one date. A finding is not an action. "We pay for two reminder tools" is a finding. "Sarah will compare both reminder tools and recommend which to drop by the 15th" is an action. Give every item a name and a deadline.

Finally, do one more thing that takes 30 seconds and saves more money than anything else on the list: Put every renewal date from your map onto a shared calendar with an alert set 60 to 90 days ahead of each one. The most expensive moment in any software relationship is the auto-renewal you didn't see coming, the one that locks you into another year before you had time to decide. A calendar entry is the cheapest insurance in the building.

What 90 Minutes Actually Buys

The first time you run this, it'll feel a little messy, and it may run long. That's OK. Once the map exists, next year's audit takes half the time, because you'll be updating a document instead of building one.

What you've produced isn't just a spreadsheet. It's the first time anyone has seen the whole stack at once: what it costs, what overlaps, where your team is doing software's job by hand, and what renews when. Most practices run for years without that picture.

Once a year for 90 minutes is all it takes to stop accumulating software and start managing it. TVB

ADAM WYSOCKI is the founder of VetSoftwareHub, the largest independent vendor-neutral directory of veterinary practice software. With 35 years of SaaS experience and a decade focused on veterinary software, he is the author of The Veterinary Software Insider on LinkedIn and a book about PIMS selection.

DOWN THE DRAIN

According to Zylo's 2024 SaaS Management Index, companies use, on average, only about half the software licenses they've purchased. Large enterprise organizations waste an average of $18 million per year on unused applications.