

# Tech Stack Quiz

How does your tech savviness stack up?



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## SCORING KEY:

**(0 points):** I don't even know what that is...so no.

**(1 point):** I've got shelf-ware...I have it, but don't ask me what it does.

**(2 points):** I have it. I use it. I would not call me an expert.

**(3 points):** I'm fully bionic.

1. My **Client File Sharing & Hosting** is:

0 1 2 3

2. My **CRM** is:

0 1 2 3

3. My **Compliance Email & Social Media Archiving** is:

0 1 2 3

4. My **Custodian** is:

0 1 2 3

5. My **Document Creation & Management** is:

0 1 2 3

6. My **Financial Planning** is:

0 1 2 3

7. My **Client Email Platform** is:

0 1 2 3

8. My **Email Marketing Platform** is:

0 1 2 3

9. My **Email Hosting** is:

0 1 2 3

10. My **eSignature** is:

0 1 2 3

11. My **Online Scheduler** is:

0 1 2 3

12. My **Portfolio Management (Billing & Performance Reporting)** is:

0 1 2 3

13. My **Risk Tolerance** is:

0 1 2 3

14. My **Virtual Conference Mtg** is:

0 1 2 3

15. My **Website Hosting** is:

0 1 2 3

16. My **Internal Project Mgmt** is:

0 1 2 3

17. My **Integration Technology** is:

0 1 2 3

18. My **Note-Taking & Writing** is:

0 1 2 3

19. My **Password Management** is:

0 1 2 3

20. My **Social Media** is:

0 1 2 3

21. My **Video Recording** is:

0 1 2 3

22. My **Web Form / Surveys** is:

0 1 2 3

23. My **Other** is:

0 1 2 3

**Total from all questions:**

## Tech-Savvy Rockstar

**Points: (50+)**

Move over Bill Gates, you're fully dialed into a bionic business.

Congratulations on building for scale and being ready to accelerate your growth.

## Techie in Training

**Points: (25-50)**

You've laid the groundwork and understand the power technology can bring to scale and efficiency. Keep up the good work, focus on really nailing a few of these and add as you go.

## Leader of the Luddites

**Points: (0-25)**

You hate technology and may even still have...dial up (gasp!) While the old school ways like handwritten letters and ledgers carry a certain charm, it's time to step up your game and pick a few things to work into your tech stack.