

Beyond the Patchwork

Building the Modern Independent Agency Tech Stack

Not a sales sheet. A vendor-neutral take-home you can use on any stack. Find the money hiding in your tools, then fix one seam this quarter.

Monday-Morning Checklist

- 1 **List every subscription** and its monthly cost in one sheet.
- 2 **Circle the overlaps** — anywhere two tools store the same data.
- 3 **Kill one seam this quarter** — the worst copy-paste in your day.
- 4 **Write a one-page AI use policy** — three sentences beats "shadow AI."
- 5 **Score your platform** against the 5 properties →

The 5-Property Platform Scorecard

- One source of truth** — the client record lives once; everything references it.
- Modular** — turn modules on/off; don't buy events to get dues.
- API-first / open** — talks to the tools you keep. Not a walled garden.
- Maintained** — updates & security patches happen to you, not by you.
- AI-native** — built so automation can reason over the data, not bolted on.

Hold every vendor — including mine — to all five. The question isn't *which logo*; it's how many it truly delivers.

Get the deck, scorecard & resources

The full slide deck · this checklist · the agency stack questionnaire · the book.
Optional: send me your hardest workflow and I'll send back a no-pitch take.

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