

Restaurant Tech Stack Review Master Worksheet

Use this worksheet to conduct a full review of your restaurant tech stack. The goal is to identify which tools to keep and optimise, which to replace (and with what), and which tools you don't yet have but need - all based on real business requirements.

Output Summary

At the end of this process, you should have three lists:

 **Tools to Keep & Optimise**
with a clear plan for training, configuration, and usage improvements.

 **Tools to Replace**
with defined requirements for the new tool and why the current one falls short.

 **Tools to Add**
with defined requirements and the problem they'll solve.

1. Define Business Objectives

List your top 3–5 business goals (e.g. reduce COGS, improve labour efficiency, increase retention)	For each goal, map out how technology should support or enable it:

2. Inventory of Current Tools by Function

Function	Tools in Use
POS & Payments (Tills, kiosks, handhelds, online payments)	
BOH Ops (Inventory, supplier management, delivery integrations, stock, prep systems)	
CRM & Loyalty (WiFi capture, reservations, guest comms, feedback tools)	
Employee Experience (Scheduling, payroll, early pay tools, training, communication)	
Business Intelligence (Dashboards, open APIs, reporting tools, data lakes)	
Infrastructure (WiFi, devices, offline capabilities, integrations)	

3. Detailed Tool Review (Repeat for Each Tool)

Tool Name:	Function (Which category above?):

	Yes	No
Is it actively used? By who? _____	☐	☐
Is the team trained properly on it?	☐	☐
Are all relevant features being used?	☐	☐
Is the configuration complete and correct (e.g. product mappings)?	☐	☐
Does it integrate well with other systems?	☐	☐
What friction or limitations exist? _____		
What business goals does it support (from Section 1)? _____		
Can it be optimised, or should it be replaced? _____		

Tool Name:	Function (Which category above?):

	Yes	No
Is it actively used? By who? _____	☐	☐
Is the team trained properly on it?	☐	☐
Are all relevant features being used?	☐	☐
Is the configuration complete and correct (e.g. product mappings)?	☐	☐
Does it integrate well with other systems?	☐	☐
What friction or limitations exist? _____		
What business goals does it support (from Section 1)? _____		
Can it be optimised, or should it be replaced? _____		

4. Replacement Tool Requirements

Tools flagged for replacement • List any tools flagged for replacement. • For each, define what the current tool is missing or doing poorly.	Requirements for a replacement • List the requirements for a replacement (must-haves, integrations, workflows, reporting needs). • Include any preferred vendors, platforms, or lessons learned from the current tool.
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5. Missing Capabilities

Based on your business goals and friction points, what tools or features are missing?

What problems would these tools solve?

What are the requirements for any new tools?

Who would use them and how often?

What systems should they connect to?

6. Prioritised Actions

Assign owners and deadlines for each action

For each tool to KEEP

List optimisation actions (training, config, usage)

For each tool to REPLACE

List replacement requirements and start shortlisting vendors

For each NEW tool

Define requirements and start researching solutions