BUILD YOUR DIGITAL PRESENCE

TECHNOLOGY STACK GUIDE

Build a practical, secure, and scalable digital foundation.

2026 EDITION • PRACTICAL BUSINESS RESOURCE

01 / START HERE

Design the Stack Around the Business

A technology stack is the connected set of platforms, applications, data, and controls that support how your business attracts customers, delivers value, operates, and learns.

The goal is not to collect software. The goal is to create a coherent operating environment in which information moves reliably, responsibilities are clear, and the business can grow without unnecessary complexity.

Business before tools

Begin with workflows, customers, risks, and outcomes. Select technology only after the requirements are understood.

One system of record

For each critical data set, establish one authoritative home and identify its accountable owner.

Integrate before duplicating

Prefer a controlled connection between systems to repeated manual entry or competing databases.

Security by default

Use least-privilege access, multifactor authentication, backups, and documented account ownership from the outset.

Plan for change

Assess portability, export options, contract terms, and migration effort before a platform becomes difficult to replace.

Measure total cost

Include implementation, administration, integrations, training, maintenance, and switching costs—not only subscription fees.

Use this guide to: define your required stack layers, shortlist platforms, evaluate trade-offs, assign ownership, and sequence implementation.

02 / ARCHITECTURE

The Seven Layers of a Business Technology Stack

Treat the stack as an interconnected system. A weakness in one layer—such as identity, data ownership, or integration—can reduce the value of every other layer.

01	Customer Experience Website, content, accessibility, search visibility, forms, portals, and customer-facing experiences.
02	Commerce & Conversion Catalog, checkout, payments, proposals, scheduling, subscriptions, and conversion workflows.
03	Customer Relationships CRM, segmentation, email marketing, service history, lifecycle communications, and consent.
04	Operations & Collaboration Project delivery, documents, communication, knowledge, finance, fulfillment, and support.
05	Data & Analytics Measurement plan, reporting, attribution, dashboards, data quality, retention, and decision support.
06	Security & Governance Identity, permissions, MFA, backups, incident response, privacy, vendor risk, and policy.
07	Integration & Automation Native connections, APIs, workflow automation, monitoring, exception handling, and documentation.

Architecture rule: every tool should have a defined purpose, owner, source of truth, data inputs, outputs, access model, and review date.

03 / CORE PLATFORM

Select the Right Digital Foundation

Your core website or commerce platform shapes content operations, conversion, integrations, maintenance, and future migration effort. Choose for the operating model—not only for visual design.

Platform	Best fit	Strengths	Watch closely
Shopify	Product-led and ecommerce businesses requiring dependable managed commerce.	Hosted store builder, checkout, inventory, responsive themes, domain and app ecosystem.	App accumulation, theme constraints, recurring operating cost, and data/integration governance.
WordPress	Content-rich, flexible sites where the business can govern hosting, plugins, and maintenance.	Open-source foundation, broad publishing capabilities, themes, plugins, and ownership flexibility.	Hosting quality, plugin conflicts, security maintenance, backups, and technical administration.
Webflow	Design-led marketing sites with structured content and visual development workflows.	Visual site building, CMS collections, responsive design, hosting, and editor workflows.	CMS and localization limits, governance of complex builds, and migration requirements.
Custom / headless	Distinct product experiences or complex integration needs with justified engineering capacity.	Maximum control over experience, architecture, performance, and integration patterns.	Highest build and maintenance burden; requires product ownership, testing, security, and engineering continuity.

Selection questions

- What must a customer be able to do from discovery through service?
- Who will publish, administer, secure, and improve the platform each week?
- Which data must move to CRM, finance, fulfillment, analytics, or service systems?
- What would migration require if the platform no longer fits in two years?
- Which capabilities are essential at launch, and which can wait?

Avoid selecting a core platform from feature volume alone. A smaller, well-governed system frequently produces better results than a broad toolset without ownership.

04 / CONFIGURATIONS

Recommended Starting Stacks by Business Model

These are configuration patterns—not fixed product prescriptions. Use the functional layers to establish requirements, then select vendors that fit your team, market, risk profile, and budget.

Business model	Customer layer	Relationship layer	Operating layer	Control layer
Service or consulting	Marketing site + scheduling/forms	CRM with pipeline and contact history	Proposals, e-signature, invoicing, project delivery	Email marketing, analytics, document and access controls
Ecommerce or product	Hosted commerce platform + catalog	Customer profiles and segmentation	Payments, inventory, fulfillment, returns, service	Lifecycle email, product analytics, fraud and access controls
Content or education	CMS + structured publishing	Subscriber or learner records	Email, community or learning platform, payments	Search, content analytics, consent and content governance
Scaling multi-team business	Governed web and portal ecosystem	Shared CRM with role-based ownership	Integrated finance, service, delivery, identity and data	Warehouse/BI where justified, automation monitoring, vendor and security governance

Minimum viable foundation

Identity

Named business accounts, MFA, role-based access, and a documented account owner.

Website

Mobile-ready experience, secure hosting, domain control, accessibility checks, forms, and analytics.

Customer record

A defined CRM or authoritative contact system with consent and lifecycle status.

Operations

A consistent home for documents, tasks, knowledge, and customer delivery.

Protection

Backups, recovery procedures, password management, vendor review, and incident contacts.

Measurement

Business objectives mapped to meaningful events, reports, and accountable reviewers.

05 / FUNCTIONAL DIRECTORY

Translate Business Needs into Technology Categories

Use examples to understand the category, then conduct your own evaluation. Vendor availability, features, pricing, and terms can change.

Capability	Examples to investigate	Evaluation focus
Business identity & email	Google Workspace; Microsoft 365	Identity ownership, MFA, groups, recovery, retention, administrator separation.
Website & content	Shopify; WordPress; Webflow	Publishing roles, performance, accessibility, SEO, hosting, exports, maintenance.
CRM	HubSpot; Salesforce; Zoho	Data model, lifecycle stages, deduplication, permissions, integrations, reporting.
Marketing automation	HubSpot; Mailchimp; Klaviyo	Consent, segmentation, deliverability, lifecycle triggers, attribution, suppression.
Commerce & payments	Shopify Payments; Stripe; PayPal	Payment scope, settlement, refunds, fraud controls, tax responsibilities, reconciliation.
Projects & knowledge	Asana; ClickUp; Notion; Microsoft Teams	Task ownership, templates, search, permissions, records, adoption, guest access.
Analytics	Google Analytics; Search Console; platform reporting	Measurement plan, tagging, consent, data quality, definitions, review cadence.
Automation & integration	Native integrations; Zapier; Make; APIs	Authentication, data mapping, monitoring, retry logic, exception ownership, limits.
Security & continuity	Password manager; endpoint controls; backups	MFA, least privilege, recovery testing, device posture, logging, response plan.

Do not assume an integration is complete because two vendors display each other’s logos. Confirm the exact objects, fields, direction, frequency, limits, authentication, error behavior, and support ownership.

06 / EVALUATION

Technology Selection Scorecard

Score each shortlisted option from 1 (poor) to 5 (excellent). Weight criteria if a particular requirement is critical. Record evidence for every score.

Criterion	Evidence to assess	A	B	C
Strategic fit	Supports the business model, customer journey, and required workflows.	__	__	__
Usability & adoption	Appropriate for the team’s skills, capacity, and daily work.	__	__	__
Integration & data	Connects required systems; supports export, ownership, and data quality.	__	__	__
Scalability	Supports credible growth in users, volume, regions, products, or complexity.	__	__	__
Security & privacy	Provides appropriate access, logging, resilience, privacy, and vendor controls.	__	__	__
Administration	Clear ownership, configuration, support, documentation, and change management.	__	__	__
Total lifecycle cost	Includes implementation, licenses, administration, integrations, training, and exit.	__	__	__
Portability & exit	Data exports, contract flexibility, migration path, and manageable switching effort.	__	__	__
TOTAL	Maximum 40 before weighting.	__/40	__/40	__/40

Decision record

Selected platform and version / plan: _____

Business owner: _____

Technical administrator: _____

Decision date and review date: _____

Critical assumptions: _____

Exit trigger or replacement threshold: _____

07 / INVENTORY

Document the Current Stack

Complete one row for every tool that stores business or customer data, controls access, collects payments, publishes content, automates work, or supports delivery.

System / purpose	Owner	Data held	Integrations	Renewal / review

Rationalization prompts

- Which tools duplicate capabilities or maintain conflicting records?
- Which accounts depend on a former employee, personal email address, or single administrator?
- Which automations can fail silently, and who reviews exceptions?
- Which contracts renew automatically without an evidence-based value review?
- Which systems lack a documented export, backup, or recovery method?
- Which tools are no longer used but still retain data or active access?

Prioritize actions as Retain, Improve, Integrate, Replace, or Retire. Do not retire a system until data retention, contractual, legal, financial, and operational requirements have been addressed.

08 / SECURITY & GOVERNANCE

Build Control into the Operating Model

Security is not a separate product category. It is a set of decisions applied across identity, platforms, devices, data, vendors, and daily operations.

Identity

Use business-managed identities, MFA, separate administrator accounts, rapid offboarding, and quarterly access reviews.

Domains & DNS

Record registrar, DNS, hosting, certificates, recovery methods, renewal dates, and authorized administrators.

Data

Define what is collected, why it is needed, where it resides, who can access it, and how long it is retained.

Backups

Confirm scope, frequency, independence, retention, encryption, restoration responsibility, and tested recovery.

Vendors

Review security, privacy, service continuity, data location, subprocessors, contract terms, and support escalation.

Changes

Document material configuration changes, test before release, maintain rollback options, and communicate ownership.

Incidents

Identify reporting channels, containment owners, external contacts, evidence preservation, and communication procedures.

Governance

Maintain an inventory, assign accountable owners, review quarterly, and remove tools or access that no longer serve a purpose.

Quarterly governance review

Review	Question	Action owner
Access	Does every active user still require the assigned role?	_____
Resilience	Were backups and recovery procedures tested?	_____
Value	Is each platform still used, effective, and proportionate in cost?	_____
Risk	Have vendor, privacy, integration, or operational risks changed?	_____

09 / IMPLEMENTATION

A Six-Stage Technology Roadmap

Sequence the work so that requirements, ownership, controls, and measurement are established before complexity expands.

01	Define Map customers, workflows, data, risks, volumes, constraints, and measurable outcomes.	☐
02	Design Choose the minimum architecture, systems of record, integration pattern, and ownership model.	☐
03	Select Evaluate platforms with evidence, lifecycle cost, security, portability, and implementation effort.	☐
04	Configure Set identities, roles, domains, data structures, controls, backups, and operating standards.	☐
05	Integrate & test Validate workflows, data accuracy, permissions, performance, accessibility, recovery, and exceptions.	☐
06	Launch & improve Train users, document procedures, monitor results, resolve issues, and conduct quarterly reviews.	☐

Launch readiness checkpoint

- ☐ Business and technical owners are named.
- ☐ Domains, billing, and administrator access belong to the business.
- ☐ Required workflows and integrations have passed acceptance tests.
- ☐ Analytics and reporting reflect agreed definitions.
- ☐ Privacy, consent, access, backup, and recovery controls are documented.
- ☐ Users are trained and support escalation is clear.
- ☐ A 30-day review and quarterly governance cadence are scheduled.

10 / ACTION PLAN

Your 30-Day Technology Priorities

Choose a small number of high-value actions. A controlled sequence is more effective than attempting a full stack replacement at once.

WEEK 1	Discover Inventory systems, owners, data, contracts, integrations, and current pain points.
WEEK 2	Decide Confirm target architecture, systems of record, evaluation criteria, and shortlists.
WEEK 3	Control Correct account ownership, enable MFA, review access, verify backups, and document recovery.
WEEK 4	Improve Implement one priority change, test end to end, train users, and define success measures.

Three priority commitments

01 Action: _____

Owner: _____ Due date: _____ Success measure: _____

02 Action: _____

Owner: _____ Due date: _____ Success measure: _____

03 Action: _____

Owner: _____ Due date: _____ Success measure: _____

Decision discipline

Before adding any new tool, identify the problem it solves, the system it replaces or complements, the accountable owner, the data it will hold, how it integrates, the complete cost, and the conditions under which it will be reviewed or retired.

11 / REFERENCE NOTES

Sources and Use Guidance

Official vendor and standards-oriented sources were consulted for current platform capabilities and foundational concepts. Verify details directly before making a purchasing or implementation decision.

Shopify — Website Builder
https://www.shopify.com/website/builder
Hosted website and commerce capabilities, themes, domains, hosting, security, and app ecosystem.

WordPress.org — Features
https://wordpress.org/about/features/
Open-source publishing features, ownership, themes, plugins, data, and extensibility.

Webflow — CMS
https://webflow.com/feature/cms
Visual CMS, structured content, editing workflows, and hosted web experiences.

HubSpot — CRM
https://www.hubspot.com/products/crm
CRM capabilities for contacts, pipelines, customer activity, marketing, sales, and service.

Google Analytics — Overview
https://support.google.com/analytics/answer/10089681
Event-based analytics and measurement across websites and applications.

Cloudflare Learning Center — SSL
https://www.cloudflare.com/learning/ssl/what-is-an-ssl-certificate/
SSL certificates, encrypted connections, authentication, and HTTPS.

Important: This guide provides general business planning information. It is not legal, privacy, cybersecurity, accounting, tax, or procurement advice. Platform capabilities, pricing, availability, policies, and integrations change. Confirm current requirements and obtain qualified professional advice where appropriate.

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