

Firm Tools & Tech Stack Advisor

Consulting & Professional Services

Document type: Plan / SOP / strategy / guide · Generated 27 Aug 2026

This guide explains what the tool produces, how to use the output, and what to watch for. The actual output (draft/report) is generated on the tool page.

Background

Get a recommended tools and tech stack to run the firm — what to look for in CRM, project management, time and billing, collaboration, accounting and proposal tools, how they integrate, and lean-vs-full budget tiers. Fill in your details below.

Purpose of this tool & output

The right tools to run the firm

How the output is used

Use the advisor to choose the right tools and tech stack to run the firm efficiently.

Important cautions

AI-generated advice; compare current tools and pricing.

Companion documents

- Consulting Practice Setup Guide
- Firm Operations SOP
- Resource Allocation Planner
- Knowledge Management System
- Quality Assurance Framework
- Firm Health Audit

This is AI-assisted guidance. Verify with a qualified professional before any binding decision. Fees, authorities and processes vary by state and change over time — confirm with your state authority.