



Technology Audit Checklist

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Business Strategy & Alignment

Assessing how technology supports overall real estate business goals and strategies.

Describe the real estate company's overarching business goals.

Write something...

How does the company currently use technology to support those goals?

Write something...



What are the biggest technology-related challenges preventing the achievement of these goals?

Write something...

Estimated annual budget allocated to technology (USD)

Enter a number...

What is the company's current level of digital maturity (e.g., Basic, Intermediate, Advanced)?

- ☐ Basic
- ☐ Intermediate
- ☐ Advanced

Which of the following technology priorities are deemed most important? (Select all that apply)

- ☐ Increased Efficiency
- ☐ Improved Client Experience
- ☐ Enhanced Data Insights
- ☐ Reduced Costs
- ☐ Increased Security

Date of last formal technology strategy review

Enter date...

Website & Online Presence

Evaluating the functionality, performance, and security of the company's website and online platforms.

Website Page Load Speed (seconds)

Enter a number...

Website Platform (e.g., WordPress, Squarespace, Custom)

- ☐ WordPress
- ☐ Squarespace
- ☐ Custom
- ☐ Other

Mobile Responsiveness Check (Select all that apply)

- ☐ Displays correctly on smartphones
- ☐ Displays correctly on tablets
- ☐ Buttons are easily clickable
- ☐ Images are optimized for mobile
- ☐ N/A - Not Applicable

Summary of Recent Website Updates (past 12 months)

Write something...

SSL Certificate Status (Valid, Expired, Not Installed)

- ☐ Valid
- ☐ Expired
- ☐ Not Installed

Screenshot of Website Home Page (for visual assessment)

 Upload File

Average Monthly Website Traffic (unique visitors)

Enter a number...

CRM & Client Relationship Management

Reviewing the use of CRM systems to manage leads, clients, and property information.

Which CRM system(s) are currently in use?

- ☐ Salesforce
- ☐ HubSpot
- ☐ Zoho CRM
- ☐ FollowUpThen
- ☐ Other (Specify in LONG_TEXT)

If 'Other' CRM selected above, please specify:

Write something...

Approximately how many active contacts are in the CRM?

Enter a number...

Which of these CRM features are currently utilized?

- ☐ Lead Management
- ☐ Contact Management
- ☐ Email Marketing Integration
- ☐ Task Management
- ☐ Reporting & Analytics
- ☐ Workflow Automation

Describe the current processes for adding new leads to the CRM.

Write something...

How well are property listings integrated with the CRM?

- ☐ Fully Integrated
- ☐ Partially Integrated
- ☐ Manually Updated
- ☐ Not Integrated

Date of last CRM system review or update.

Enter date...

What are the biggest challenges/pain points with the current CRM implementation?

Write something...

Marketing Automation & Digital Marketing

Examining the automation of marketing efforts, including email marketing, social media, and advertising.

Website Traffic (Monthly)

Enter a number...

Average Email Open Rate

Enter a number...

Average Click-Through Rate (Email)

Enter a number...

Current Marketing Automation Platform Used

- ☐ HubSpot
- ☐ Mailchimp
- ☐ Marketo
- ☐ ActiveCampaign
- ☐ Other - Please Specify

Digital Marketing Channels Utilized

- ☐ SEO
- ☐ PPC (Google Ads, etc.)
- ☐ Social Media Marketing (Facebook, Instagram, etc.)
- ☐ Content Marketing (Blog, Videos, etc.)
- ☐ Email Marketing
- ☐ Remarketing/Retargeting

Description of Social Media Strategy

Write something...

Lead Source Tracking Accuracy

- ☐ Highly Accurate
- ☐ Moderately Accurate
- ☐ Somewhat Accurate
- ☐ Not Accurate

Last Marketing Campaign Performance Review Date

Enter date...

Data Management & Analytics

Analyzing how data is collected, stored, analyzed, and used to inform decision-making.

Number of Active Listings in CRM

Enter a number...

Approximate Total Records in Property Database

Enter a number...

Primary Data Storage Method

- ☐ Cloud-Based Database (e.g., AWS, Azure)
- ☐ On-Premise Server
- ☐ Spreadsheets (e.g., Excel, Google Sheets)
- ☐ Combination

Describe the process for Data Entry and Validation

Write something...

Which of the following data sources are integrated?

- ☐ MLS (Multiple Listing Service)
- ☐ Public Records
- ☐ Social Media
- ☐ Lead Generation Platforms
- ☐ Third-Party Valuation Tools

What analytics tools are currently being used?

- ☐ Google Analytics
- ☐ CRM Reporting
- ☐ Custom Dashboards
- ☐ None
- ☐ Other

Briefly describe how data is used to optimize marketing campaigns.

Write something...

Date of Last Data Backup

Enter date...

Property Management Systems (PMS)

Focuses on systems used to manage rental properties, maintenance requests, and tenant communications (if applicable).

PMS Vendor Currently in Use?

- ☐ AppFolio
- ☐ Buildium
- ☐ Yardi Breeze
- ☐ Rent Manager
- ☐ Other (Specify in Long Text)

If 'Other' was selected above, please specify the PMS vendor.

Write something...

Number of Properties Managed Through the PMS?

Enter a number...

Which of these PMS features are currently utilized?

- ☐ Online Rent Payments
- ☐ Maintenance Request Tracking
- ☐ Tenant Communication Portal
- ☐ Lease Management
- ☐ Financial Reporting
- ☐ Vacancy Marketing
- ☐ Other (Specify in Long Text)

If 'Other' was selected above, please specify the PMS features utilized.

Write something...

Last PMS System Upgrade Date?

Enter date...

Does the PMS integrate with other systems (e.g., accounting, CRM)?

☐ Yes

☐ No

If yes above, please list the integrated systems and describe the integration.

Write something...

Is tenant data stored and managed within the PMS?

☐ Yes

☐ No

Transaction Management & e-Signature

Checking processes and software used for managing transactions, contracts, and electronic signatures.

Current e-Signature Software Used?

☐ DocuSign

☐ Adobe Sign

☐ HelloSign

☐ SignNow

☐ Other (Specify in Long Text)

If 'Other' selected above, please specify:

Write something...

Are transaction workflows automated?

- ☐ Yes
- ☐ No
- ☐ Partially

Average time (in days) to finalize a transaction (pre-tech audit)

Enter a number...

Sample Transaction Workflow Document (for review)

 Upload File

Which integrations are used with the e-signature platform?

- ☐ CRM (e.g., Salesforce, HubSpot)
- ☐ MLS (Multiple Listing Service)
- ☐ Accounting Software (e.g., QuickBooks)
- ☐ Email Marketing Platform
- ☐ None

Last time e-signature platform was reviewed for security updates

Enter date...

Describe any pain points or inefficiencies related to transaction management and e-signature processes.

Write something...

Cybersecurity & Data Privacy

Evaluating the measures in place to protect sensitive data and comply with privacy regulations.

What cybersecurity framework(s) are you following (e.g., NIST, ISO 27001)?

- ☐ NIST Cybersecurity Framework
- ☐ ISO 27001
- ☐ Other
- ☐ None

How many active user accounts are in your primary systems?

Enter a number...

Do you regularly conduct vulnerability scans of your systems?

- ☐ Yes - Annually
- ☐ Yes - Quarterly
- ☐ Yes - Monthly
- ☐ No

Briefly describe your data backup and recovery procedures.

Write something...

Which of the following data privacy regulations apply to your business?

- ☐ GDPR
- ☐ CCPA
- ☐ HIPAA
- ☐ Other (Specify)
- ☐ None

Do you have a written incident response plan?

- ☐ Yes
- ☐ No
- ☐ In Progress

Please upload your current privacy policy (if applicable).

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Describe employee training procedures related to data privacy and security.

Write something...

Hardware & Infrastructure

Assessing the physical equipment and underlying infrastructure supporting technology operations.

Number of Desktops/Laptops in Use

Enter a number...

Number of Servers (Physical/Virtual)

Enter a number...

Primary Internet Service Provider (ISP)

- ☐ Verizon
- ☐ Comcast
- ☐ AT&T
- ☐ Spectrum
- ☐ Other

Internet Bandwidth (Download Speed in Mbps)

Enter a number...

Backup Solution Type

- ☐ Cloud-Based Backup
- ☐ On-Site Backup
- ☐ Hybrid Backup
- ☐ No Backup Solution

Last Hardware Inventory Date

Enter date...

Description of Current Network Topology

Write something...

Wireless Network Security Protocol

- ☐ WEP
- ☐ WPA
- ☐ WPA2
- ☐ WPA3
- ☐ Unsecured

UPS (Uninterruptible Power Supply) Capacity (in VA)

Enter a number...

Training & User Adoption

Reviewing the effectiveness of training programs and user adoption rates for key technologies.

Percentage of Employees Trained on Primary CRM System

Enter a number...

Average Time to Complete Core Software Training (in hours)

Enter a number...

Training Delivery Method (Select all that apply)

- ☐ In-person
- ☐ Online Modules
- ☐ Live Webinar
- ☐ Documentation/Knowledge Base
- ☐ Shadowing

Describe the current onboarding process for new technology introductions.

Write something...

How are ongoing technology skill gaps identified and addressed?

- ☐ Annual Performance Reviews
- ☐ Regular Feedback Surveys
- ☐ Informal Observation
- ☐ Technology Usage Analytics
- ☐ Not Currently Addressed

Which technologies experience the most significant user adoption challenges?

- ☐ CRM
- ☐ Marketing Automation
- ☐ Property Management Software
- ☐ e-Signature Tools
- ☐ Other (Please Specify in Long Text)

Date of last user training needs assessment

Enter date...

Describe examples of user feedback regarding technology training or support.

Write something...