

# Technology Audit Checklist

 Show only Checklist

Display Style  
Default 

## 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).**

 Upload File

**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...