

Tech-Stack Checklist for Machine Shops

As outlined in MakingChips Episode MC 465

Core Operations & Workflow

- ☐ ERP system (e.g., ProShop)
 - ☐ QMS integration (for ISO/AS certification needs)
 - ☐ Machine monitoring (e.g., integrated via API)
 - ☐ Digital work instructions / paperless traveler system
 - ☐ Setup and runtime data tracking (estimate vs. actual)
 - ☐ Preventative maintenance tracking
 - ☐ Tool management system
 - ☐ G-code and file management
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Communication & Infrastructure

- ☐ Business domain email (e.g., yourname@yourcompany.com)
- ☐ Choose email host: Gmail or Microsoft Exchange
- ☐ Plan factory communication infrastructure (Wi-Fi, Ethernet)
- ☐ Cloud-hosting provider selected (Google, Microsoft, Amazon)

- ☐ Redundant internet connection (e.g., 5G hotspot w/ NAT)
 - ☐ Cybersecurity plan in place (internal or third-party support)
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Sales & Customer Management

- ☐ CRM system (e.g., HubSpot – free tier acceptable early on)
 - ☐ Professional website tied to your domain
 - ☐ Newsletter/email marketing capability
 - ☐ Branding consistency across digital tools
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Engineering & Estimating

- ☐ Quoting software (e.g., Paperless Parts or ERP-native module)
 - ☐ CAD/CAM software
 - ☐ Estimation system for material, setup, and run time
 - ☐ Feedback loop between actual vs. estimated job costs
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Finance & Accounting

- ☐ Accounting software (e.g., QuickBooks, Xero, Sage)
 - ☐ Integration with ERP for POs and invoices
 - ☐ Assign financial tool ownership (internal or firm-based)
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Team Buy-In & Support

- ☐ Involve staff in tech decisions
- ☐ Provide initial and ongoing training
- ☐ Use software with strong community/support resources
- ☐ IT consultant or support partner on call