

External Data Exchange Stack Map

Date: _____
Firm: _____

A working artifact from your 30-minute consolidation review

1 Map Your Current Stack · then categorize each as Consolidates / Stays / Depends

CATEGORY	VENDOR / PRIMARY USE	APPROX. ANNUAL COST	RENEWAL DATE	INTERNAL OWNER	C / S / D
MFT / file transfer					☐ C ☐ S ☐ D
E-signature (sensitive docs)					☐ C ☐ S ☐ D
DLP · PHI / PII detection					☐ C ☐ S ☐ D
Legacy SFTP server(s)					☐ C ☐ S ☐ D
Email gateway / secure mail					☐ C ☐ S ☐ D
Audit prep / evidence export					☐ C ☐ S ☐ D
Shared drive (external)					☐ C ☐ S ☐ D

☐ C Consolidates ☐ S Stays ☐ D Depends

2 Sequencing Choice

An 18-month operational program, not a single switching decision. Mark the path that fits your organization’s appetite.

☐ **Renewal-Driven**
Consolidate one tool at a time as each contract comes up. Lowest risk, slowest unlock.

☐ **Anchor-Driven**
Replace the largest single contract first; fold in adjacent tools at their renewals. Common mid-market pattern.

☐ **Strategic-Driven**
Scope a single program with a target end-state architecture. Highest effort, fastest unlock.

3 Decisions

Anchor renewal date that triggers a real evaluation:

Internal stakeholders to bring into the consolidation conversation:

One thing I want to learn more about: