

FIND YOUR QUICK SAVINGS

Software Stack Audit Template

Audit what you already pay for — find overlap, gaps, and quick savings.

WHAT THIS TEMPLATE DOES

Most small and mid-size businesses pay for tools they've forgotten about, tools that do the same job as something else they already use, or tools nobody actually relies on. This template walks you through a complete audit of your software stack — what you pay, who uses it, what it does, whether it overlaps, and whether to keep, renegotiate, or cut it. Most businesses find 15–30% in recoverable spend in a single sitting.

HOW TO USE IT

1 Gather your bills & logins first

Pull your last card and bank statement. Look for monthly and annual charges — most surprises hide in auto-renewing annual bills.

2 Complete one row per tool

Fill every column honestly. Unknown = leave blank. The gaps matter: a blank “Owner” or “Last Used” is your first red flag.

3 Run the overlap + gap analysis

Use the Category roll-up to spot tools doing the same job. Then check the gaps — manual work a cheap tool could handle.

4 Build your action list

The Summary turns your audit into a ranked action list — cancellations, renegotiations, consolidations, and gaps. Bring it to your budget review.

Time to complete

2–4 hrs first time; 30-min refresh

Who does it

Owner or ops lead + finance

When to run

Annually + before any new purchase

Set up your audit before you start the inventory.

Pull your last card and bank statement first — you can't audit what you can't see.

AUDIT DETAILS

Business / organization

Annual technology budget (approx)

Prepared by

Audit date

SOFTWARE CATEGORY REFERENCE

Use these categories in your inventory dropdown

CRM & Sales

Customer tracking, pipeline, sales automation, outreach

Operations & Projects

Project mgmt, task tracking, automation, scheduling

Communication & Collab

Email, video calls, team chat, file sharing

HR & People

Hiring, onboarding, time tracking, performance, benefits

Analytics & BI

Dashboards, reporting, data viz, forecasting

Other / Uncategorized

Tools that don't fit above — flag for review

Finance & Accounting

Bookkeeping, invoicing, payroll, expenses, tax

Marketing

Email, social, SEO, ads, landing pages, design

Customer Service

Help desk, live chat, ticketing, feedback

IT & Security

Passwords, VPN, backup, device mgmt, access control

Industry-Specific

Vertical tools unique to your industry or model

VERDICT KEY

You'll pick one of these per tool in the inventory

KEEP

Essential — actively used, no better alternative, cost justified

REDUCE

Downgrade, reduce seats, or renegotiate — value exists but overspend detected

CONSOLIDATE

Overlaps with another tool — merge use cases into one platform

EVALUATE

Unsure — needs a 30-day usage check before deciding

CUT

Cancel — not used, duplicate, or cost exceeds value

TIP Start with EVALUATE for any tool whose "Last Used" is blank or older than 90 days — then run a 30-day usage check.

Software inventory — Tools 1–15 of 30

One row per tool. Costs total automatically by category on the Summary page (Adobe Acrobat Reader).

#	TOOL / APP	CATEGORY	MO \$	YR \$	USR	OWNER	USED	WHAT IT DOES	VERDICT	NOTES
1										
2										
3										
4										
5										
6										
7										
8										
9										
10										
11										
12										
13										
14										
15										
Subtotal — Tools 1–15 of 30 as-billed column sums			Mo \$		Yr \$					

TIP Annual contracts hiding in your bank statement? Search “annual” + each tool name — they’re easy to forget.

Software inventory — Tools 16–30 of 30

One row per tool. Costs total automatically by category on the Summary page (Adobe Acrobat Reader).

#	TOOL / APP	CATEGORY	MO \$	YR \$	USR	OWNER	USED	WHAT IT DOES	VERDICT	NOTES
16										
17										
18										
19										
20										
21										
22										
23										
24										
25										
26										
27										
28										
29										
30										

Subtotal — Tools 16–30 of 30 Mo \$ Yr \$
as-billed column sums

TIP Not sure what a tool costs? Log in to its billing page — it takes 2 minutes and is always more than you remember.

Find what you're paying for twice — and what you're not paying for at all.

OVERLAP MAP

Tools that do the same job cost you twice — group by what they actually do

FUNCTION / USE CASE	TOOL 1	TOOL 2	TOOL 3	OVERLAP \$	KEEP WHICH?
Email marketing				\$	
Project / task management				\$	
Document storage / file sharing				\$	
Video conferencing				\$	
CRM / contact management				\$	
Invoicing / billing				\$	
Team communication / chat				\$	
Password management				\$	
				\$	
				\$	
				\$	

GAP ANALYSIS

Manual work a cheap tool could automate — a gap is a saving in disguise

MANUAL PROCESS / GAP	HOW YOU DO IT TODAY	\$ / WEEK	PRIORITY	POTENTIAL TOOL TO FILL IT
Following up on unpaid invoices		\$		
Scheduling meetings / appointments		\$		
Collecting & organizing customer feedback		\$		
Employee onboarding paperwork		\$		
Social media posting & scheduling		\$		
Generating monthly performance reports		\$		
		\$		

TIP If the manual cost per week beats a tool's price, the gap is costing you more than the fix would. That's a quick win.

Your audit, turned into a ranked action list.
YOUR TOTAL STACK COST

Auto-totals by category from your inventory — annualized (monthly × 12 + annual)

CATEGORY	# TOOLS	MONTHLY (eq.)	ANNUAL	% STACK	NOTES
CRM & Sales	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Finance & Acctg	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Ops & Projects	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Marketing	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Comms & Collab	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Customer Svc	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
HR & People	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
IT & Security	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Analytics & BI	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Industry	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Other	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
GRAND TOTAL — FULL STACK	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	

ACTION PLAN

Ranked by fastest savings and easiest wins first

VERDICT	TOOL	SPECIFIC ACTION	SAVINGS/YR	OWNER	DONE BY
<input type="text"/>	<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	<input type="text"/>	<input type="text"/>

ESTIMATED TOTAL ANNUAL SAVINGS \$

SIGN-OFF

Audit completed by Reviewed by

Completion date

NEXT → Replacing a tool?
 Before buying anything new, run it through the 7-Step Tech Decision Series — starting with the Business Case One-Pager and TCO Calculator.
bizhealth.ai/biztools/technology