



Auditing and Benchmarking Software as a Service (SaaS) Applications

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Ten Years Ago Today:

The Most Common SaaS Subscriptions

Core Business Apps



Specialized Apps



Today: Different SaaS Stacks for Every Division in Every Industry *(Example: 1 Company, 97 products)*

Office-Admin (31)	 Microsoft	 ORACLE	 DocuSign	 workday.	 smartsheet	 cornerstone	 KRONOS	 slack
Back Office-IT (8)	 SOLARWINDS	 dbt	 CloverDX	 STIBO SYSTEMS MASTER DATA MANAGEMENT	 OneTrust PRIVACY, SECURITY & GOVERNANCE	 RAPID7		
Customer Service (6)	 8x8	 salesforce	 qualtrics	 zowie	 sprinklr			
Marketing (26)	 cvent	 twilio	 pepperjam	 yelp	 Adobe	 esri THE SCIENCE OF WHERE™		
Supply Chain (7)	 Cleo	 onfleet	 akeneo	 ptc	 vector			
Retail eCommerce (7)	 SAP Hybris	 SALSIFY	 bloomreach	 FARTER				
Retail Stores (12)	 Honeywell	 Theatro a Motorola Solutions Company	 ServiceChannel	 PROFITECT	 SiteZeus			

The more specialized the applications, the less you know:



About the Products

Example:

- A company might use Cleo for B2B data integration and Onfleet for last-mile delivery management.
- No single person understands the entire flow of product movement from supplier to doorstep.



About the Process

Example:

- For retail eCommerce, each product handles a sliver
- Hybris (commerce platform), Salsify (product content), Bloomreach (site search/UX), Forter (fraud prevention).



About the People

Example:

- Theatro (voice-based team communication) and ServiceChannel (facilities management).
- The IT team may never meet store associates using Theatro.
- Facilities vendors may have a separate procurement relationship behind ServiceChannel's portal.

Organizing SaaS Applications

Product Name	Who Owns it?	Who uses it?	What is it for?	Where is it connected?
Vendor and product name.	The division or department that is the primary owner of the product.	The product may be used by a broader worker base than the primary owner	The functionality and potential functionality of the product. Important for consolidation.	Other systems that are either dependent on the product or the product is dependent on.
Example: <i>Salsify PXM</i>	<i>Retail eCommerce Director</i>	<i>E-Commerce Team Product Marketing Sales Operations</i>	<i>Manage and distribute product data and images. A customer sees a product online, the content is complete, up-to-date, and persuasive.</i>	<i>Online stores Oracle ERP</i>



Audit methodology

Three Questions

Should we even have it?

Are we paying the right amount for it?

What's the best way to use it?



Inventory

Identify and validate all services and subscriptions



Benchmark

Verify contract compliance.
Identify best market rates for high volume services



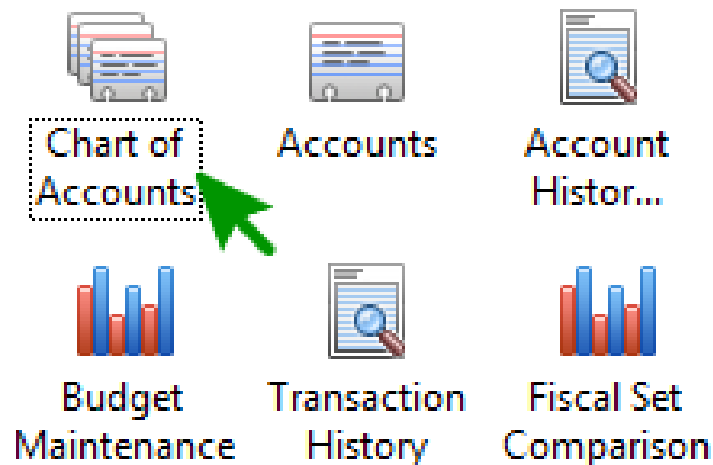
Optimize

Look for redundant functionality.
Look for underused functionality

Sources for SaaS Inventory

GL Account Based

- Direct Invoices (Usually multiple GLs)
- Expense Accounts
- A/P Reports (Look for relevant suppliers or GLs)



Technology Based

- Application Discovery Tools (e.g. Microsoft Defender for Cloud Apps, ServiceNow SaaS License Management)
- SSO Records (Okta, OneLogin, Entra ID)
- SaaS Vendor Portals



Foundational Audits – Enterprise Platforms

Key targets: Office suites, ERP systems (products used by all office workers)

- ✓ Easiest to start with
- ✓ Most common savings opportunity: Employees not offboarded correctly



Case Study

Microsoft 365 Audit



Users were automatically onboarded to F3/F5 Combo, when upgraded to an E5 group, these F3/F5 licenses remained.



Multiple users ID'd with no email or login access for months.

Also checked Teams, since some F3 users did not use email.



Large number of unused Visio licenses



Number of E5 users with blocked credentials



Resulted in 15% Savings



Off boarded user credentials cross-references with HubSpot, and Adobe – ID'd additional old credentials for more savings!



Specialized Applications

One-size-fits-all fails in complex SaaS environments:

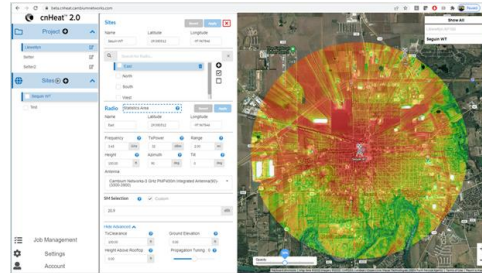
- Prioritize usage patterns and license relevance
- Map how data flows across systems
- Consider compliance requirements (GDPR, PCI, etc.)

Optimization must match platform intent, for example:

- Legal: Focus on risk and compliance
- Retail: Consolidate to reduce tool sprawl
- Supply chain: Prioritize speed and visibility

Strategy includes:

- Eliminate redundant tools
- Align pricing tiers to actual usage





Collaboration with application owners: They are the SMEs and will know the product competitors.



You will need to focus on listening and learning before suggesting changes.



Balancing performance and cost: Cost savings do not matter if they increase risk or diminish productivity.

Building Stakeholder Trust



HANDLING MISSION-
CRITICAL APPLICATIONS



NEGOTIATION AND
LICENSING TACTICS



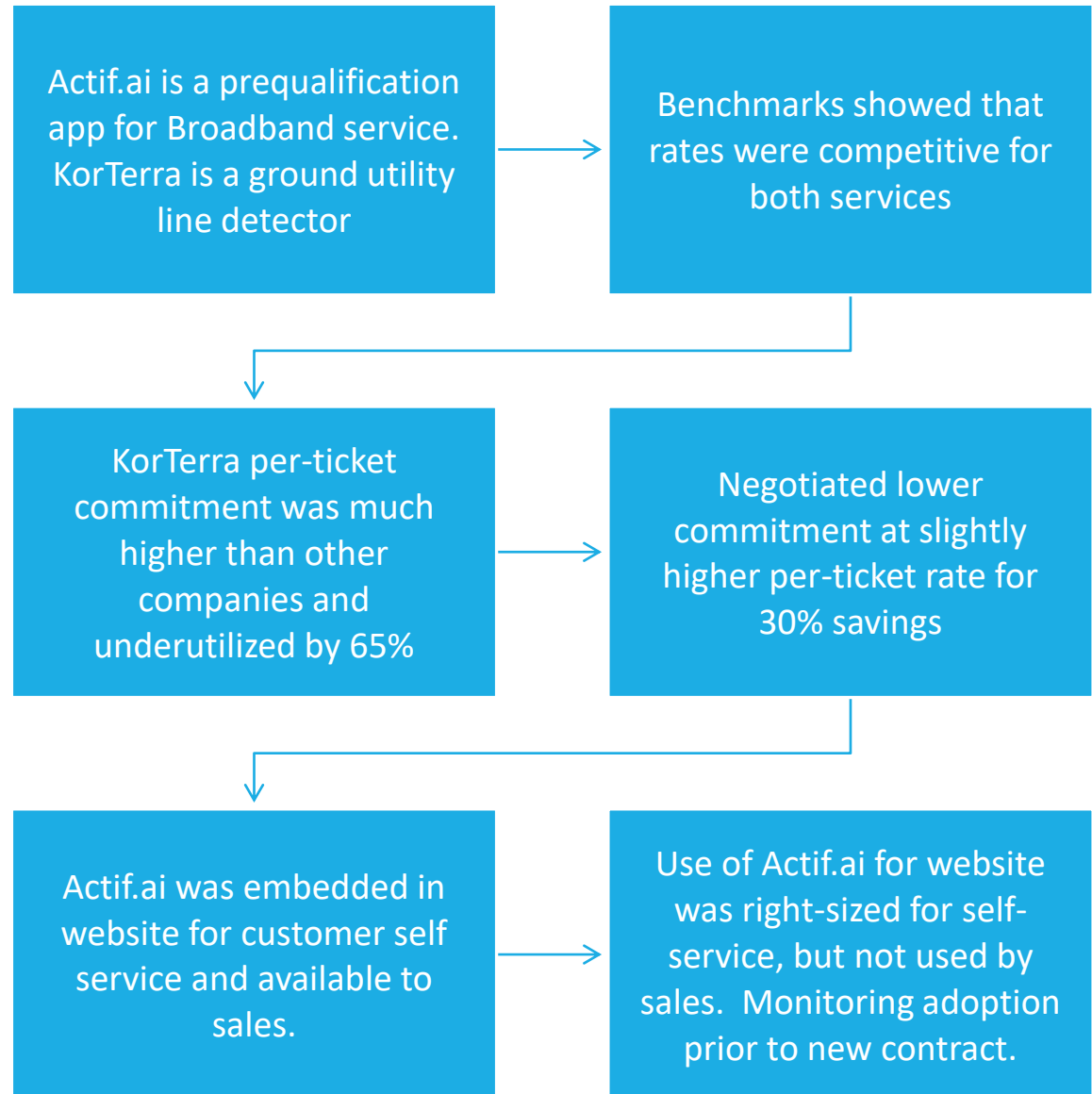
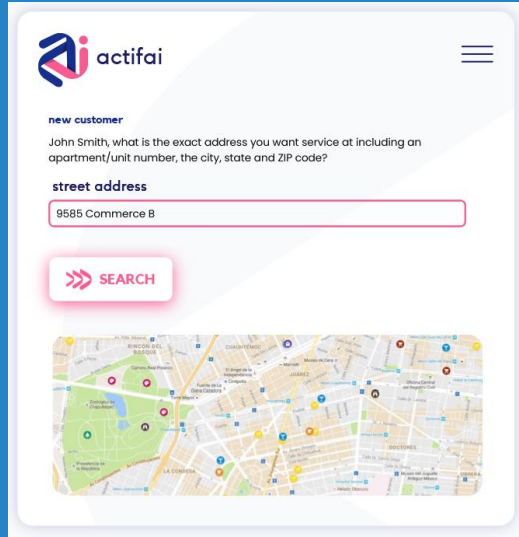
MAXIMIZING ROI WITHOUT
SWITCHING PLATFORMS

When Change Isn't an Option

Case Studies

Specialized Locator Apps for ISPs:

Actif.ai and KorTerra



Communicating Impact to Leadership

Application Name	Owner/Dept	Function	Monthly Cost	Licenses	Utilization Rate	Notes / Risks	Savings Potential	Recommended Action
Microsoft 365 E5 IT		Productivity Suite	\$12,000	150	72%	35 users only use email + Teams	20–30%	Downgrade unused E5 to E1 or F3
Zoom	HR	Video Conferencing	\$1,800	45	50%	Redundant with Teams	40–60%	Consolidate into Teams
Smartsheet	Operations	Project Mgmt	\$2,200	60	65%	No central ownership	15–25%	Review overlap with MS Planner
DocuSign	Legal	eSignature	\$1,600	30	85%	Strong adoption	0–5%	No changes; negotiate renewal
Slack	Dev/IT	Messaging	\$3,500	80	35%	Partial Teams overlap	20–40%	Rationalize Slack vs Teams
Salesforce	Sales	CRM	\$18,000	40	95%	Tier-1 system	0–10%	Optimize add-on licenses
Zendesk	Support	Helpdesk	\$4,000	20	60%	Used by Tier 1 only	10–20%	Review tiered access & seats
Miro	Marketing	Whiteboarding	\$900	25	20%	Unused since pandemic	60–80%	Decommission or reduce seats
Workday	HR	ERP / HRIS	\$9,500	Org-wide	90%	Critical system	0–5%	Monitor but retain full access
Bit.ly	Marketing	Link Tracking	\$300	5	15%	Free alternatives exist	80–100%	Replace with free version

Thank you



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