Tech Stack Audit Checklist

Company: _____ Owner: _____ Audit Window (Q/M): _____

Purpose: Use this checklist to run a fast, operator-grade audit that reduces waste, eliminates overlap, and consolidates around tools that truly serve the business. Start with right-sizing plans, then remove redundancies. Re-run quarterly.

1) Prep

☐ Export last 3–12 months of SaaS/P&L expense lines (GL codes for software).

☐ Pull user/app lists from SSO/MDM (Okta/Azure AD/Google Workspace) for discovery.

☐ Create a single source of truth (Sheet/Airtable/Notion) for the inventory.

☐ List renewal dates & auto-renew flags; start vendor outreach ≥60 days before renewal.

2) Voice of the Team (Quick Interviews)

☐ Meet each function (Sales, Marketing, Ops, Finance, Support) for 5–15 minutes.

☐ Capture daily-used tools, critical features, and pain points / duplicates.

☐ Identify 'power users' willing to pilot changes and train others.

3) P&L ⇄ Reality Reconciliation

☐ Map every software line item to a tool → team → owner → seats → cost → renewal date.

☐ Flag orphan charges (no owner), zombie tools (no users), and over-seated licenses.

☐ Calculate quick savings: unused seats, annual vs. monthly billing, tax exemptions if applicable.

4) Comprehensive Inventory (Paid + Free)

☐ Record plan/tier, features actually used, integrations, last-login/usage, and data scope.

☐ Tag each tool by category (e.g., PM, Design, Chat, Automation, Analytics, CS, BI).

☐ Note data owners & risk (PII/PHI/PCI) and confirm DPA/security posture.

5) Tier Optimization (Start Here)

☐ Check if newer plans are cheaper with more features vs. legacy plans you're on.

☐ Downgrade tiers that exceed actual usage; remove premium add-ons not used.

☐ Right-size seats to active users and reassign idle licenses.

☐ Negotiate pricing prior to renewal; lock multi-year if ROI and roadmap justify.

6) Overlap & Redundancy

☐ Cluster tools by job-to-be-done; identify 80% feature overlaps and pick a winner.

☐ Model switching costs (migration, training, integrations) vs. savings/benefit.

☐ Plan decommissioning: freeze new usage, migrate data, revoke access, cancel/notify.

7) AI & Platform Consolidation

☐ Review recent AI features in your core platforms; evaluate if they replace point tools.

☐ Pilot consolidation where one platform can subsume narrow tools without regressions.

Example: Figma's AI (e.g., "Make") can generate prototypes from prompts and expands into Sites/marketing—potentially replacing light prototyping or site tools. Link: https://www.figma.com/blog/config-2025-press-release/

8) Governance

☐ Assign an owner per tool (budget, usage, renewal).

☐ Create a one-page intake for any new tool (overlap check, data flow, exit strategy).

☐ Quarterly mini-audits: seats vs. active users; feature usage; support volume; ROI.

☐ Centralize procurement & set approval thresholds to prevent shadow IT.

9) Renewal Calendar

☐ 60–90 days pre-renewal: usage review + vendor negotiation checklist.

☐ 30 days pre-renewal: finalize tier/seat changes; schedule deprovisioning if needed.

☐ Post-renewal: update inventory; communicate changes to teams.

10) Track Outcomes

☐ SaaS run-rate reduction (monthly/annual).

☐ App count (total + sanctioned).

☐ License utilization % (active seats / paid seats).

☐ Tool NPS / CSAT from internal users post-consolidation.

☐ Mean time to provision/deprovision; SSO coverage %.

Appendix A: Inventory Template (See CSV)

Use the accompanying CSV to seed a Google Sheet. Suggested columns included.