# The 30-Minute Software Checkup

A practical worksheet for recording software owners, seats, costs, renewal dates, access risks, and next actions.

For small agencies, consultants, professional-service businesses, and remote teams with approximately 2–30 people.

Version 1.0 · Updated October 2026 · Published by Cintherian

Start with your statements. Record what you know. Mark unknowns clearly. Assign one owner and one date to every follow-up action.

### What this worksheet does

Use this worksheet to create a working inventory of your business software. The first pass helps you identify:

- Software you pay for, and the person responsible for each account
- Purchased and assigned seats, plus monthly and annual costs
- Renewal dates and cancellation deadlines
- Duplicate or ownerless tools, and former-user access
- The next action for every subscription

This worksheet does not guarantee savings and does not replace a contract review, security assessment, accounting advice, or professional advice.

### What you need

Before starting, gather:

- The last three months of card statements
- Bank statements or accounting records, and recent software invoices
- Billing logins for known services
- A list of current employees and contractors
- A calendar for renewal reminders, and this worksheet

### The 30-minute process

| TIME | TASK | GOAL |
|---|---|---|
| 2 minutes | Prepare | Open statements and the worksheet |
| 8 minutes | Inventory | List every software charge |
| 8 minutes | Review seats | Check owners, users, and inactive access |
| 7 minutes | Check renewals | Record renewal dates and notice periods |
| 5 minutes | Assign actions | Decide what happens next |

### Important

Do not write passwords, MFA codes, recovery codes, API keys, access tokens, private keys, or confidential client information in this worksheet.

### Account labels · use these consistently

- Keep — the tool is needed and appropriately configured.
- Downgrade — the tool is needed, but seats or features may be reduced.
- Cancel — the tool is no longer needed after data and dependency checks.
- Investigate — ownership, usage, renewal, billing, or data details remain unclear.

## Section A · Software inventory — list every tool

Start with statements and invoices, not memory. Include monthly, annual, prepaid, reimbursed, and marketplace-billed software.

| # | TOOL OR VENDOR | PURPOSE | ACCOUNT OWNER | BILLING OWNER | MONTHLY $ | ANNUAL $ |
|---|---|---|---|---|---|---|
| ___ | _____ | _____ | _____ | _____ | _____ | |
| ___ | _____ | _____ | _____ | _____ | _____ | |

| # | TOOL OR VENDOR | PURPOSE | ACCOUNT OWNER | BILLING OWNER | MONTHLY $ | ANNUAL $ |
|---|---|---|---|---|---|---|
| (continued) | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |

### What counts as a tool?

Email and collaboration · accounting and payroll · project management · cloud storage · design and development · CRM and sales · scheduling · password management · backup and security · website and hosting · domain and DNS · advertising · analytics · client portals · e-signature · AI tools · file transfer · other recurring business services.

### Inventory questions

- ☐ Reviewed at least three months of statements
- ☐ Checked employee reimbursements
- ☐ Checked unfamiliar vendor names
- ☐ Duplicate tools identified
- ☐ Checked annual charges
- ☐ Checked marketplace subscriptions
- ☐ Every tool has an owner

## Section B · Seats, users, and access

Use this section after opening the administration panel for each important tool.

| TOOL | SEATS BOUGHT | SEATS USED | ACTIVE USERS | INACTIVE USERS | FORMER USERS | ADMINS |
|---|---|---|---|---|---|---|
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |

### Review questions · for each tool

- ☐ Account owner still with the organization
- ☐ All paid seats assigned
- ☐ Former employees or contractors still listed
- ☐ Too many administrators
- ☐ Tool contains client data
- ☐ Shared links exist
- ☐ Billing owner still correct
- ☐ Any users inactive 60+ days
- ☐ Unnecessary guest users
- ☐ Service account or integration depends on it
- ☐ Removing a seat affects files or ownership
- ☐ Active API tokens or integrations

### Access findings

| TOOL | FINDING | RISK OR IMPACT | ACTION OWNER | DUE DATE |
|---|---|---|---|---|
| | | | | |
| | | | | |
| | | | | |
| | | | | |

| TOOL | FINDING | RISK OR IMPACT | ACTION OWNER | DUE DATE |
|---|---|---|---|---|
| (continued) | | | | |

Security reminder: a former user's active account is an access issue as well as a billing issue. Transfer ownership, preserve required data, revoke access, and document completion.

## Section C · Renewals and cancellation deadlines

The renewal date is not always the cancellation deadline. Record both when possible.

| TOOL | RENEWAL DATE | NOTICE PERIOD | CANCELLATION DEADLINE | NOTICE METHOD | REMINDER DATE |
|---|---|---|---|---|---|
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |

### Where to check

Billing or administration panel · current invoice · contract or order form · renewal email · card statement · vendor account manager · vendor billing support.

### Vendor-contact list · use when the renewal date or notice period is unclear

| VENDOR | DATE CONTACTED | CONTACT METHOD | RESPONSE DUE | RENEWAL RISK | NEXT FOLLOW-UP |
|---|---|---|---|---|---|
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |

### Copy-ready vendor request

Subject: Please confirm renewal and license terms — [Company Name]

Hello [Vendor or Account team],

We are reviewing our [Product] subscription and would like written confirmation of: current plan; purchased and assigned seats; next renewal date; cancellation or downgrade deadline; required notice period; available downgrade options; and data-export and retention terms. Please confirm the terms for our current account or provide a link to the correct billing page.

This request asks for information only and does not authorize a cancellation or plan change.

Thank you, [Name] · [Role] · [Company] · [Account email]

## Section D · Decision and action register

Every tool should receive one decision: Keep · Downgrade · Cancel · Investigate.

| TOOL | DECISION | REASON | EXPORT? | ACTION OWNER | DUE DATE | STATUS |
|---|---|---|---|---|---|---|
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |

"Export?" column = data export needed before the change (Yes / No).

### Decision guide

Keep — use when: the tool supports current work; the cost is justified; the owner is known; renewal details are recorded; access is appropriate.
Downgrade — use when: too many seats are purchased; premium features are not needed; a lower plan meets the actual requirement; the vendor permits a plan change; data and permissions will remain suitable.
Cancel — use when: the tool is no longer needed; a replacement is ready; required data has been exported and checked; client and integration dependencies are resolved; cancellation terms are understood.
Investigate — use when: the account owner is unknown; the renewal date is unknown; the tool's purpose is unclear; client data may be stored there; an integration or automation may depend on it; the invoice does not match expectations.
Do not cancel a tool holding client or business data until the required export is complete and verified.

## Section E · Data, integrations, and continuity

Complete this section for tools marked Downgrade, Cancel, or Investigate.

| TOOL | CLIENT DATA | FILES OR RECORDS | INTEGRATIONS | SHARED LINKS | OWNERSHIP TRANSFERRED | EXPORT VERIFIED |
|---|---|---|---|---|---|---|
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |

### Before canceling or downgrading

- ☐ Identify stored client and business data
- ☐ Identify files, records, and project history
- ☐ Check forms and automations
- ☐ Check API connections and integrations
- ☐ Check shared links
- ☐ Transfer ownership
- ☐ Export required data
- ☐ Open representative files
- ☐ Confirm that attachments and folders are present
- ☐ Test the replacement workflow
- ☐ Confirm vendor retention terms
- ☐ Save the vendor's confirmation
- ☐ Check the next invoice

### Export record

**Tool** _____ **Export date** _____

**Exported by** _____ **Storage location** _____

**Files or records included** _____ **Verification completed by** _____

**Verification date** _____ **Replacement workflow tested** _____

Do not write credentials or secrets in this record.

## Section F · Cost summary

Use actual invoice amounts where possible.

| CATEGORY | MONTHLY $ | ANNUAL $ |
|---|---|---|
| | | |
| | | |
| | | |
| | | |

| CATEGORY | MONTHLY $ | ANNUAL $ |
|---|---|---|
| (continued) | | |
| | | |
| | | |

### Cost findings

**Number of subscriptions reviewed** _____ **Number of ownerless tools** _____

**Number of duplicate tools** _____ **Number of unused or unassigned seats** _____

**Number of former-user accounts** _____ **Renewals within 90 days** _____

**Potential annual reduction** _____ **Confirmed annual reduction** _____

**Replacement cost** _____

Label estimates as potential or projected until the vendor confirms the change and a later invoice verifies it.

### Important cost questions

- ☐ Subscription monthly or annual?
- ☐ Price based on active or purchased users?
- ☐ Is the change prorated?
- ☐ Does cancellation delete or restrict data?
- ☐ Minimum seat requirement?
- ☐ Seat removal takes effect immediately?
- ☐ Does downgrade remove security features?
- ☐ Is a replacement tool required?

## Section G · Final review and next audit

### Inventory complete

- ☐ Statements and invoices reviewed
- ☐ Annual tools listed
- ☐ Marketplace purchases checked
- ☐ Billing owners recorded
- ☐ Monthly tools listed
- ☐ Reimbursed tools checked
- ☐ Account owners recorded
- ☐ Duplicate tools flagged

### Access review complete

- ☐ Purchased and assigned seats checked
- ☐ Former users reviewed
- ☐ Administrators reviewed
- ☐ Shared credentials reviewed
- ☐ Inactive users reviewed
- ☐ Guest access reviewed
- ☐ Integrations checked
- ☐ Client data identified

### Renewal review complete

- ☐ Renewal dates recorded
- ☐ Cancellation deadlines recorded
- ☐ Vendor questions sent
- ☐ Notice periods recorded
- ☐ Renewals within 90 days flagged
- ☐ Calendar reminders created

### Action review complete

- ☐ Every tool has a decision
- ☐ Every action has a due date
- ☐ Cancellations or downgrades documented
- ☐ Next audit date is set
- ☐ Every action has an owner
- ☐ Data exports complete where needed
- ☐ Follow-up actions scheduled

### Final sign-off

**Audit completed by** _____ **Role** _____

**Date** _____ **Reviewed by** _____

**Review date** _____ **Next audit date** _____

### Main findings

_____

_____

_____

### Highest-priority next action

**Action** _____ **Owner** _____

**Due date** _____ **Expected result** _____

## Renewal calendar export sheet

Use this page to transfer dates into your shared calendar. Suggested reminders: 120, 90, 60, and 30 days before renewal, plus the internal decision deadline. Use the vendor's actual notice period — a 90-day reminder may be insufficient for a contract requiring earlier notice.

**Tools to schedule** _____ **Calendar used** _____

**Reminder owner** _____ **Date scheduled** _____

| TOOL | RENEWAL DATE | INTERNAL DECISION DATE | REMINDER DATES | OWNER |
|---|---|---|---|---|
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

## Quarterly software review

**Review period** _____ **Reviewer** _____

**Date** _____

### Review checklist

- ☐ New software added
- ☐ Account owners confirmed
- ☐ User and seat counts checked
- ☐ Administrator access checked
- ☐ Cancellation deadlines updated
- ☐ Old software removed
- ☐ Billing owners confirmed
- ☐ Former-user access checked
- ☐ Renewal dates updated
- ☐ Client data and exports reviewed

## Changes since the previous review

| CHANGE | TOOL | OWNER | DATE | NOTES |
|---|---|---|---|---|
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |