Small Agency Software & Access Checkup

Log every owner, seat, and renewal date in one 30-minute pass.

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Section A · Renewals

One row per tool you pay for. Fill the renewal date and the seat count you actually pay for - unused seats are where recoverable spend hides.

TOOL	OWNER	$ / MO	SEATS	RENEWAL DATE

Section B · Offboarding

For each departure, record what was closed and who confirmed it.

Person _____ **Accounts / devices** _____

Access revoked _____ **Verified by** _____

Date _____ **Client handover** _____

Section C · Project tools

One row per tool your team depends on to deliver client work.

Must-have workflow _____ **Client access needed** _____

Permissions _____ **Reporting** _____

My next action

Unassigned fixes do not happen. One action, one owner, one date.

My next action _____

Owner _____

Due date _____

How to use this sheet

Block 30 minutes and pull up your card statements.
Fill Section A (renewals) first - it is where the money hides.
Assign one next action with an owner and a date. Unassigned fixes do not happen.
A tool that holds client data is never cancelled until its export is done.
Verify seat counts before removing access.

A triage record, not a completed audit - it lists what you still need to check.
Interactive version with deadline maths and a calendar export: tools.cintherian.com
How we test and what we do not do: cintherian.com/how-we-test