Technology Waste Audit Checklist

For Civil Engineering and Professional Services Firms

Prepared by InfraTech Strategy Group

Technology waste, the expense of underutilized, redundant, or forgotten software subscriptions, represents one of the largest controllable cost drains in professional services and AEC firms. Industry data reveals that organizations waste an average of **$259 per desktop annually** on unused software, with some firms losing over $25,000 per year on licensing for tools that provide no measurable value.

This checklist provides a structured framework for identifying, quantifying, and eliminating technology waste in your organization. Rather than a compliance exercise, this audit positions your firm to optimize spending while improving operational efficiency and reducing security risk.

Whether you conduct this audit internally or engage InfraTech for a comprehensive engagement, the following categories and questions will guide your assessment from discovery through action planning.

Part 1: Inventory and Visibility

Objective

Establish a complete, authoritative inventory of all software subscriptions and technology spending across your organization.

Why This Matters: You cannot manage what you cannot see. Many firms discover that purchasing decisions are decentralized across departments, making it nearly impossible to know total spend or identify duplicates. This section creates that baseline visibility.

1.1 Subscription Discovery

- [ ] **Compile all software subscriptions from multiple sources:**
    - [ ] Accounting systems and general ledger (monthly/annual recurring charges)
    - [ ] Corporate credit card statements and expense reports
    - [ ] Department budgets and approved vendor lists
    - [ ] Procurement records and PO history
    - [ ] Direct IT department vendor contracts
    - [ ] Cloud service accounts (AWS, Azure, Google Cloud)
    - [ ] Legacy systems and older contracts no longer on active budgets
- [ ] **Create a master software inventory spreadsheet including:**
    - [ ] Software name and vendor
    - [ ] License type (per-seat, enterprise, perpetual, subscription)
    - [ ] Annual cost (calculate if monthly)
    - [ ] License count (seats purchased vs. needed)
    - [ ] Renewal date and contract term
    - [ ] Primary department owner
    - [ ] Business function (Project Management, CAD, Accounting, Collaboration, etc.)
    - [ ] Contract holder/approver name and contact information
- [ ] **Validate recurring charges:**
    - [ ] Identify auto-renewal subscriptions and terms
    - [ ] Confirm billing frequency (monthly vs. annual vs. multi-year)
    - [ ] Flag any trial-to-paid conversions that may have gone unnoticed
    - [ ] Check for price escalation clauses in multi-year contracts

- [ ] **Estimate total annual software spend:**
    - [ ] Sum all subscriptions to determine baseline
    - [ ] Segment by department or cost center
    - [ ] Calculate software spend as percentage of IT budget
    - [ ] Document any variability or uncertainty in your inventory

Outcome: Complete inventory of 100% of identified software subscriptions with accurate costs and ownership.

1.2 Contract and Renewal Management

- [ ] **Document contract terms for all material subscriptions ($500+/year):**
    - [ ] Contract start and end dates
    - [ ] Minimum license commitments and seat counts
    - [ ] Renewal notice periods and termination requirements
    - [ ] Auto-renewal provisions and how to cancel
    - [ ] Price escalation clauses or fixed pricing agreements
    - [ ] True-up provisions requiring reconciliation at contract end
    - [ ] Volume discount thresholds
    - [ ] Multi-year discounts or commit-and-save offers
- [ ] **Create a renewal calendar:**
    - [ ] List all renewals by month and quarter
    - [ ] Identify which contracts require action in next 12 months
    - [ ] Document renegotiation windows (typically 30-90 days before renewal)
    - [ ] Assign ownership for contract review and renewal decision
- [ ] **Review vendor lock-in risks:**
    - [ ] Identify tools with high switching costs or data portability challenges
    - [ ] Document any penalties for early termination or license reduction
    - [ ] Note critical integrations that may prevent switching
- [ ] **Validate contract compliance:**
    - [ ] Confirm your organization is complying with minimum license commitments
    - [ ] Identify any license count overages or underpurchase situations
    - [ ] Review true-up invoices for accuracy

Outcome: Proactive contract management capability tied to renewal dates and business priorities.

1.3 Departmental Mapping

- [ ] **Assign ownership for each tool:**
    - [ ] Identify primary department (Engineering, Finance, HR, etc.)
    - [ ] Name the primary business function the tool supports
    - [ ] Document secondary departments/users if applicable
    - [ ] Identify the contract owner responsible for renewals
- [ ] **Document tool-to-business-function alignment:**
    - [ ] List core functions for each tool (why was it purchased?)
    - [ ] Note if tool supports temporary project needs vs. ongoing operations
    - [ ] Flag tools implemented for specific departing employees or past clients
    - [ ] Document whether tool supports critical workflows or is supplementary
- [ ] **Create a business capability map:**
    - [ ] List major business capabilities (Project Delivery, Finance, HR, Compliance, etc.)
    - [ ] Document which tools support each capability
    - [ ] Identify tools supporting the same capability (potential redundancy)
    - [ ] Note any gaps in tool coverage for critical business functions

Outcome: Clear ownership and accountability for each software investment.

Part 2: Usage and Adoption Analysis

Objective

Validate whether purchased licenses are actually being used and whether users are realizing value from their subscriptions.

Why This Matters: 53% of SaaS applications go underutilized or unused, with organizations purchasing more licenses than they actually need. This section identifies the gap between licenses purchased and licenses actively used.

2.1 User Activity Validation

- [ ] **Gather usage data for each application:**
    - [ ] Request active user reports from each vendor
    - [ ] Review login history for last 30, 60, and 90 days
    - [ ] Identify accounts with zero activity in past 30 days
    - [ ] Document accounts created but never used
    - [ ] Review feature utilization within each tool (if available)
- [ ] **Compare purchased licenses to active users:**
    - [ ] Count total licenses purchased for each tool
    - [ ] Count users with activity in the last 30 days
    - [ ] Calculate adoption percentage (active users / purchased licenses)
    - [ ] Flag tools with adoption below 50% for deeper review
    - [ ] Identify tools where adoption is declining month-over-month
- [ ] **Analyze user segments:**
    - [ ] Review which departments/roles actively use each tool
    - [ ] Identify department-specific adoption rates
    - [ ] Document power users vs. occasional users vs. inactive accounts
    - [ ] Note seasonal usage patterns (if applicable)
- [ ] **Identify inactive accounts requiring attention:**
    - [ ] List accounts with zero activity in past 90 days
    - [ ] Confirm whether inactive accounts are from departed employees, contractors, or paused users
    - [ ] Document seats being held for potential future use vs. truly unused
    - [ ] Note any accounts that should be reassigned or offboarded

Outcome: Clear picture of actual vs. purchased utilization for each tool.

2.2 Cost-Per-User Analysis

- [ ] **Calculate cost per active user for each tool:**
    - [ ] Total annual subscription cost ÷ active users = cost per user per year
    - [ ] Compare across similar tools (e.g., project management tools, collaboration platforms)
    - [ ] Identify tools with exceptionally high cost-per-user
    - [ ] Benchmark against industry standards where available
- [ ] **Perform value-versus-cost assessment:**
    - [ ] For high-cost tools: validate that usage justifies the expense
    - [ ] For low-adoption tools: question whether value is being realized
    - [ ] Calculate payback period (cost per user vs. time savings/productivity gains)
    - [ ] Document tools delivering strong ROI and those underperforming
- [ ] **Identify tier optimization opportunities:**
    - [ ] Review whether users are on appropriate license tiers
    - [ ] Identify users on premium tiers who only need basic functionality
    - [ ] Document users on basic tiers who might benefit from upgrades (if ROI is positive)
    - [ ] Review volume-based pricing to ensure organization is on optimal tier

Outcome: Cost transparency and justification for continued investment in each tool.

2.3 Feature Utilization and User Satisfaction

- [ ] **Confirm whether paid features are being used:**
    - [ ] For each tool, document advertised features
    - [ ] Review which features your users actually access
    - [ ] Identify paid add-ons or premium features that are not being utilized
    - [ ] Document if basic subscription tier would meet actual needs
- [ ] **Assess training and change management:**
    - [ ] Determine whether users have adequate training on tool functionality
    - [ ] Identify tools where training gaps may be suppressing adoption
    - [ ] Review whether tool selection or implementation was user-driven or IT-mandated
    - [ ] Document user satisfaction and perceived value of each tool

- [ ] **Perform user interviews for high-spend tools ($5,000+/year):**
    - [ ] Ask department heads and power users about tool value
    - [ ] Document specific problems the tool solves vs. workarounds being used
    - [ ] Identify tools that users would choose to eliminate
    - [ ] Note tools that are considered essential to daily operations

Outcome: Evidence-based assessment of whether each tool is delivering value to intended users.

Part 3: Redundancy and Overlap Assessment

Objective

Identify tools with duplicate or overlapping functionality that could be consolidated to reduce spend.

Why This Matters: Organizations average 7.6 duplicate SaaS subscriptions, with multiple departments independently purchasing tools that serve the same function. This section identifies consolidation opportunities.

3.1 Cross-Department Tool Inventory

- [ ] **Map tools by business function:**
    - [ ] Create a grid listing all tools organized by business capability
    - [ ] Group similar tools (e.g., all project management tools, all design tools, etc.)
    - [ ] Document which departments use which tools
    - [ ] Identify functions supported by multiple tools
- [ ] **Identify obvious duplicates:**
    - [ ] Same vendor tools purchased by different departments (e.g., Slack by Engineering and Slack by Marketing)
    - [ ] Different vendors with overlapping functionality (e.g., two separate CAD tools, two project dashboarding tools)
    - [ ] Tools purchased to replace others but never fully retired
    - [ ] Multiple spreadsheet-based solutions for the same function
- [ ] **Document reasons for tool proliferation:**
    - [ ] Were tools purchased to solve department-specific needs?
    - [ ] Were different tools selected during different vendor evaluation periods?
    - [ ] Were tools retained from acquired firms or merged departments?
    - [ ] Do different tools serve genuinely different functions despite similar names?

Outcome: Visual map of redundant and overlapping tool investments.

3.2 Core Platform Assessment

- [ ] **Review core platform capabilities:**
    - [ ] Document features and functionality within core business systems (ERP, Project Management Platform, CRM, etc.)
    - [ ] Identify point solutions currently being purchased for functionality already available in core systems
    - [ ] Review whether core systems are being fully utilized or if custom modules remain unconfigured
    - [ ] Document ease of data integration between point solutions and core platforms
- [ ] **Evaluate consolidation feasibility:**
    - [ ] For each redundant tool: can the function be absorbed into an existing platform?
    - [ ] Assess implementation effort and cost to bring functionality in-house
    - [ ] Document data migration or transition requirements
    - [ ] Calculate break-even timeline (transition costs vs. annual savings)
    - [ ] Note any business process changes required for consolidation
- [ ] **Document mandatory retentions:**
    - [ ] Identify tools that cannot be consolidated due to client requirements, legal holds, or critical integrations
    - [ ] Note tools where switching costs exceed annual savings
    - [ ] Document client-specific tools that may have contractual requirements

Outcome: Prioritized list of consolidation opportunities with business case for each.

3.3 Feature Overlap Analysis

- [ ] **Create feature comparison matrix for overlapping tools:**
    - [ ] List all tools in each functional category
    - [ ] Compare key features across tools
    - [ ] Identify which features are actually being used
    - [ ] Note feature gaps in lower-cost alternatives
- [ ] **Evaluate consolidation preferences:**
    - [ ] For each functional category: determine which tool offers best fit
    - [ ] Assess user preferences (which tool do teams prefer?)
    - [ ] Document migration path (how would teams transition to consolidated tool?)
    - [ ] Identify must-have features that consolidated tool must provide

- [ ] **Quantify consolidation savings:**
    - [ ] Calculate annual spend across current tools in each functional category
    - [ ] Document cost of recommended consolidated tool
    - [ ] Estimate one-time implementation/migration costs
    - [ ] Calculate net annual savings and payback period

Outcome: Data-driven recommendations for tool consolidation with estimated impact.

Part 4: Operational Fit and Risk Assessment

Objective

Evaluate whether tools integrate smoothly with existing systems and whether they introduce unacceptable security, compliance, or operational risks.

Why This Matters: Tools that don't integrate cleanly create manual workarounds, duplicate data entry, and increased operational burden. Tools that introduce unmanaged security risks create exposure beyond their cost.

4.1 Integration and System Connectivity

- [ ] **Document integration status for each tool:**
    - [ ] Does tool integrate with core business systems (ERP, project management platform, etc.)?
    - [ ] What type of integration exists: native API, third-party tool, manual export/import, or no integration?
    - [ ] Does integration require custom development or ongoing maintenance?
    - [ ] Are there data synchronization issues or reconciliation requirements?
- [ ] **Identify integration gaps:**
    - [ ] Document tools where data entry occurs in multiple places (manual double-entry)
    - [ ] List tools that export data to spreadsheets for processing or consolidation
    - [ ] Identify workflow gaps where tools don't communicate with each other
    - [ ] Note any tools on critical paths that lack robust integration
- [ ] **Assess integration health:**
    - [ ] Are integrations maintained and working reliably?
    - [ ] Do integrations break with vendor product updates?
    - [ ] Are there documented procedures for troubleshooting integration issues?
    - [ ] Is there a single owner responsible for managing integrations?
- [ ] **Evaluate single sign-on (SSO) and access management:**
    - [ ] How many tools support SSO integration with your identity provider?
    - [ ] How many tools require separate username/password management?
    - [ ] Are there tools using outdated or non-compliant authentication methods?
    - [ ] Document user experience friction from repeated login requirements

Outcome: Inventory of integration complexity and opportunities to reduce manual processes.

4.2 Access Management and Offboarding

- [ ] **Document access control procedures:**
    - [ ] Is there a formal process for granting and revoking tool access?
    - [ ] Who is responsible for creating and deleting user accounts?
    - [ ] Are there documented approval workflows for new tool access?
    - [ ] Is there a centralized registry of who has access to each tool?
- [ ] **Review offboarding process:**
    - [ ] Do you have a checklist of all tools requiring access revocation when employees depart?
    - [ ] What is the typical timeline for removing departing employee access?
    - [ ] Are there documented cases of access not being revoked in a timely manner?
    - [ ] Who is responsible for ensuring complete offboarding?
- [ ] **Assess license reassignment capability:**
    - [ ] When an employee departs, can their licenses be reassigned to another user?
    - [ ] Are there tools where licenses cannot be reassigned (are locked to individual accounts)?
    - [ ] What is the process for identifying available licenses to reassign?
    - [ ] Are licenses being wasted because they cannot be easily reassigned?
- [ ] **Evaluate access control maturity:**
    - [ ] Are access levels appropriate to job function?
    - [ ] Are there tools where everyone has admin-level access?
    - [ ] Do you have visibility into who has access to sensitive data or functions?
    - [ ] Are there ghost accounts or inactive accounts still holding access?

Outcome: Documentation of access management risks and offboarding gaps.

4.3 Security, Compliance, and Data Risk

- [ ] **Inventory tool security characteristics:**
    - [ ] Does each tool meet your security requirements (encryption, data residency, etc.)?

    - [ ] Are tools SOC 2 certified? HIPAA compliant? GDPR compliant?
    - [ ] What is the vendor's data breach history?
    - [ ] Where is data stored (on-premise, cloud region, specific geography)?
- [ ] **Identify unmanaged tools and shadow IT:**
    - [ ] Are there tools purchased by individual departments without IT approval?
    - [ ] Are there tools being used that are not on the approved software list?
    - [ ] Do you have visibility into all data repositories and integrations?
    - [ ] Are there personal cloud storage or messaging tools being used for sensitive data?
- [ ] **Assess data security and residency:**
    - [ ] What types of data does each tool process (personal info, design files, financial data, etc.)?
    - [ ] Are tools appropriately classified based on data sensitivity?
    - [ ] Are there tools storing sensitive data without your knowledge or approval?
    - [ ] Do you have documented data deletion procedures for each tool?
- [ ] **Review vendor security and compliance practices:**
    - [ ] When was the vendor's last security assessment or audit?
    - [ ] What security certifications does the vendor maintain (ISO 27001, etc.)?
    - [ ] Does the vendor have a documented incident response process?
    - [ ] Are there any public security disclosures or breach history?
- [ ] **Document vendor contractual obligations:**
    - [ ] Does the vendor agree to support your compliance requirements?
    - [ ] Are there terms allowing vendor access to your data?
    - [ ] Does the contract include minimum security standards?
    - [ ] What are the data deletion and return requirements if you cancel?

Outcome: Risk register documenting security and compliance exposure from current tools.

4.4 Operational Dependencies

- [ ] **Identify business-critical tools:**
    - [ ] Which tools support revenue-generating or project-critical workflows?
    - [ ] Which tools would create significant disruption if unavailable?
    - [ ] Are there single-tool dependencies that create concentration risk?
    - [ ] Document vendor stability and whether there is risk of vendor failure or discontinuation

- [ ] **Assess tool maturity and roadmap:**
    - [ ] For each tool: is the vendor investing in product development or winding down?
    - [ ] Are there tools using outdated technology or approaching end-of-life?
    - [ ] Do vendor product roadmaps align with your business needs?
    - [ ] Are there tools being discontinued or acquired by competitors?
- [ ] **Evaluate support and vendor responsiveness:**
    - [ ] What level of support does each vendor provide (email, phone, premium support)?
    - [ ] What is the typical response time for critical issues?
    - [ ] Do you have dedicated account management or are you managing through self-service?
    - [ ] Document any historical issues with vendor responsiveness

Outcome: Understanding of operational dependencies and concentration risks.

Part 5: Contract and Vendor Optimization

Objective

Review vendor contracts for negotiation opportunities and optimize pricing, terms, and bundling.

Why This Matters: Many organizations accept default pricing without exploring volume discounts, bundling opportunities, or favorable contract terms. This section identifies concrete savings opportunities through vendor negotiation.

5.1 Pricing and Discount Review

- [ ] **Audit current pricing for each tool:**
    - [ ] Confirm the pricing your organization is paying for each license tier
    - [ ] Research list pricing for comparison
    - [ ] Identify whether current pricing reflects any discounts
    - [ ] Document the discount percentage you're receiving (if any)
- [ ] **Identify volume discount opportunities:**
    - [ ] For tools where adoption is high: are you receiving volume pricing?
    - [ ] Research tiered pricing structures for each vendor
    - [ ] Calculate what pricing you would receive at different volume levels
    - [ ] Estimate savings from moving to next volume tier if contract allows
- [ ] **Evaluate annual vs. monthly billing:**
    - [ ] Document current billing frequency for each subscription
    - [ ] Calculate savings from annual prepayment vs. monthly billing
    - [ ] Assess cash flow impact of shifting to annual billing
    - [ ] Identify vendors that offer annual-payment discounts
- [ ] **Review seat optimization:**
    - [ ] For per-seat tools: confirm you have the right number of licenses
    - [ ] Calculate cost of reducing licenses based on actual usage data (from Part 2)
    - [ ] Explore whether lower tiers provide sufficient functionality
    - [ ] Assess per-user vs. flat-rate pricing models
- [ ] **Document promotional pricing or introductory rates:**

    - [ ] Identify tools where pricing may be promotional or introductory
    - [ ] Document when pricing is expected to increase
    - [ ] Plan renewal timing to coincide with best pricing opportunities
    - [ ] Assess whether to consolidate or cancel tools before price increases

Outcome: Clear picture of pricing optimization opportunities and potential savings.

5.2 Contract Term and Renewal Negotiation

- [ ] **Analyze multi-year discount opportunities:**
    - [ ] For each tool: determine vendor's multi-year discount (typically 10-20% for 2-3 year commitments)
    - [ ] Calculate total cost savings from multi-year commitment vs. annual renewal
    - [ ] Assess confidence in continued use of tool before committing to multi-year terms
    - [ ] Document any penalty for early termination in multi-year contracts
- [ ] **Review contract terms for unfavorable provisions:**
    - [ ] Identify auto-renewal provisions and document required notice periods
    - [ ] Flag price escalation clauses (especially large automatic increases)
    - [ ] Assess true-up clauses requiring reconciliation at contract end
    - [ ] Review minimum commitment clauses and early termination penalties
    - [ ] Document any exclusivity or non-compete provisions
- [ ] **Evaluate bundling and package deals:**
    - [ ] Are there other vendor solutions that could be bundled with current purchase?
    - [ ] Would bundling provide better pricing than current separate purchases?
    - [ ] Assess implementation and training costs if expanding vendor relationship
    - [ ] Calculate total cost of ownership if consolidating on single vendor
- [ ] **Create a renewal negotiation plan:**
    - [ ] For each tool with renewal in next 12-24 months: document negotiation priorities
    - [ ] Prioritize tools by spend level and negotiation potential
    - [ ] Prepare competitive RFP for highest-spend tools
    - [ ] Align renewals to maximize bundling and multi-year discount opportunities
    - [ ] Identify 60-90 day pre-renewal window to initiate conversations

Outcome: Negotiation strategy and timeline for optimizing contract terms and pricing.

5.3 Vendor Evaluation and Alternative Comparison

- [ ] **Create competitive landscape for high-spend tools:**
    - [ ] For tools exceeding $10,000 annually: research alternative vendors
    - [ ] Document feature comparison between current vendor and alternatives
    - [ ] Assess switching costs (migration, training, implementation)
    - [ ] Evaluate whether alternatives could replace multiple current tools
- [ ] **Document build-vs-buy analysis:**
    - [ ] For any tool: assess whether functionality could be built in-house
    - [ ] Calculate total cost of ownership (implementation, maintenance, support)
    - [ ] Compare to annual software cost
    - [ ] Assess resource requirements and opportunity costs
- [ ] **Evaluate emerging solutions:**
    - [ ] Are there newer, lower-cost alternatives gaining market adoption?
    - [ ] Have market conditions changed since tool was initially selected?
    - [ ] Are there AI-powered tools offering better functionality at lower cost?
    - [ ] Document case studies from peer firms using alternative solutions
- [ ] **Maintain vendor performance scorecards:**
    - [ ] Document key metrics for each vendor (uptime, support responsiveness, feature delivery)
    - [ ] Track vendor performance against documented SLAs
    - [ ] Document any issues or incidents with vendors
    - [ ] Use performance data to prioritize vendors for renegotiation

Outcome: Evidence-based list of vendors to approach for competitive proposals and opportunities for switching.

Part 6: Decision and Action Planning

Objective

Categorize each tool and create a prioritized action plan to realize savings and reduce risk.

Why This Matters: Conducting an audit is valuable only if findings translate into action. This section creates accountability and timeline for implementing recommendations.

6.1 Tool Categorization and Decision

- [ ] **Categorize each tool using decision matrix:**

Decision	Definition	Criteria
RETAIN	Keep and optimize	Essential to business, active adoption, reasonable cost, acceptable risk profile
REDUCE	Right-size or optimize current tool	High cost but necessary; opportunity to reduce licenses, downgrade tier, or negotiate price
CONSOLIDATE	Merge with overlapping tool	Redundant functionality; can be absorbed into existing platform with acceptable implementation effort
RETIRE	Discontinue and transition	Underutilized, high risk, available alternatives, or replaced by core platform

- [ ] **Apply decision logic for each tool:**
    - [ ] **RETIRE if:** adoption < 30% OR cost/user > X benchmark OR security risk unacceptable OR available alternatives exist
    - [ ] **CONSOLIDATE if:** overlapping functionality exists AND implementation cost < 3 years of savings AND users can migrate
    - [ ] **REDUCE if:** adoption 30-50% OR cost/user significantly above benchmark OR lower tier would suffice
    - [ ] **RETAIN if:** essential to business OR active adoption OR strong ROI OR strategic importance
- [ ] **Document decision rationale for each tool:**
    - [ ] What data/analysis influenced the decision?

    - [ ] Who was consulted (department heads, users, stakeholders)?
    - [ ] What would change the decision (e.g., if adoption increases, we would retain)?
    - [ ] Are there any caveats or timing dependencies?

Outcome: Clear categorization of all tools with documented reasoning.

6.2 Savings Calculation and ROI

- [ ] **Quantify savings from RETIRE decisions:**
    - [ ] Annual cost of tools being retired
    - [ ] One-time transition/offboarding costs
    - [ ] Net savings in year 1 and ongoing annual savings
- [ ] **Quantify savings from REDUCE decisions:**
    - [ ] Current annual cost of tools being right-sized
    - [ ] Projected cost after license reduction, tier downgrade, or price negotiation
    - [ ] One-time implementation or migration costs
    - [ ] Net savings in year 1 and ongoing annual savings
- [ ] **Quantify savings from CONSOLIDATE decisions:**
    - [ ] Current annual cost of redundant tools being consolidated
    - [ ] Cost of consolidated tool serving both functions
    - [ ] One-time implementation, migration, and training costs
    - [ ] Ongoing savings from eliminating redundant tool
    - [ ] Additional benefits (reduced licenses, simplified support, integration gains)
- [ ] **Create savings summary:**
    - [ ] Total potential savings from all RETIRE decisions
    - [ ] Total potential savings from all REDUCE decisions
    - [ ] Total potential savings from all CONSOLIDATE decisions
    - [ ] Total one-time costs to achieve savings
    - [ ] Timeline to payback on one-time costs
    - [ ] Total net annual savings (once all initiatives complete)

Outcome: Executive-level summary showing financial impact of recommendations.

6.3 Implementation Roadmap and Prioritization

- [ ] **Prioritize decisions by impact and complexity:**
    - [ ] High-impact, low-complexity decisions (execute immediately)
    - [ ] High-impact, moderate-complexity decisions (plan and execute over 6-12 months)
    - [ ] Low-impact decisions (include in next renewal cycle)
    - [ ] Complex decisions requiring further analysis or business case development
- [ ] **Create action plan timeline:**
    - [ ] **Immediate (0-30 days):** Cancel unused tools, reduce licenses with no migration impact
    - [ ] **Short-term (30-90 days):** Initiate vendor negotiations for REDUCE decisions, plan consolidations
    - [ ] **Medium-term (90-180 days):** Implement consolidations, migrate users, retire overlapping tools
    - [ ] **Ongoing:** Monitor for new tools, review annually, capture savings from renegotiations
- [ ] **Document dependencies and sequencing:**
    - [ ] Identify tools that depend on other tools (sequence consolidations accordingly)
    - [ ] Note any tools requiring stakeholder approval or change management
    - [ ] Document any tools bundled with other decisions (e.g., retiring Tool A enables consolidation of Tools B+C)
    - [ ] Assess user impact and readiness for major transitions
- [ ] **Assign ownership and accountability:**
    - [ ] RETIRE decisions: owner responsible for offboarding and data cleanup
    - [ ] REDUCE decisions: owner responsible for license reduction or tier downgrade
    - [ ] CONSOLIDATE decisions: owner responsible for migration planning and execution
    - [ ] Executive sponsor: responsible for tracking overall progress and removing blockers
- [ ] **Establish metrics and monitoring:**
    - [ ] Track actual savings realized vs. projected
    - [ ] Monitor adoption of consolidated tools
    - [ ] Identify any tools attempting to creep back after retirement
    - [ ] Document lessons learned for future software decisions

Outcome: Month-by-month implementation plan with owner accountability and success metrics.

6.4 Governance and Ongoing Software Management

- [ ] **Establish software governance framework:**
    - [ ] Create written policy requiring approval for new software purchases
    - [ ] Define approval authority based on cost level
    - [ ] Require documented business case for any new software exceeding $5,000/year
    - [ ] Establish mandatory review process before purchasing to identify existing solutions
- [ ] **Implement ongoing monitoring:**
    - [ ] Schedule quarterly reviews of top 20 software subscriptions
    - [ ] Perform annual comprehensive review of all subscriptions (use this checklist)
    - [ ] Monitor usage metrics for tools in CONSOLIDATE or REDUCE categories
    - [ ] Flag any new subscriptions appearing on corporate credit cards or departmental budgets
- [ ] **Create repeatable process:**
    - [ ] Use this checklist as template for annual or biennial audits
    - [ ] Maintain master software inventory with regular updates
    - [ ] Track all RETIRE, REDUCE, and CONSOLIDATE actions and their outcomes
    - [ ] Create audit trail documenting purchase approval and usage validation
- [ ] **Establish vendor review cadence:**
    - [ ] Identify high-spend vendors requiring regular review
    - [ ] Schedule vendor performance reviews at least 90 days before renewal
    - [ ] Benchmark pricing against market alternatives annually
    - [ ] Maintain relationship with alternative vendors for competitive positioning

Outcome: Sustainable software management practice preventing future waste accumulation.

Part 7: How InfraTech Strategy Group Helps

Comprehensive Technology Waste Audits for AEC and Professional Services Firms

InfraTech conducts technology waste audits as a structured, low-disruption engagement designed specifically for professional services and AEC firms. We handle the full audit process from subscription discovery and usage analysis to executive-level recommendations, so your internal teams are not burdened with time-consuming manual data gathering.

Our Approach

- **Financial Review:** Complete analysis of software spending across accounting systems, credit cards, and departmental budgets
- **Usage Data Analysis:** Gathering login activity, user adoption metrics, and feature utilization from all vendors
- **Operational Context:** Understanding how tools integrate with your systems and which are business-critical
- **Executive Validation:** Working directly with firm leadership and department heads to validate findings and ensure recommendations are practical
- **Clear Recommendations:** Delivering a comprehensive report outlining current spend, identified waste, risk exposure, and prioritized actions

What You Receive

- **Baseline Report:** Current software inventory, spend summary, and adoption analysis
- **Findings and Recommendations:** Specific tools categorized as Retain, Reduce, Consolidate, or Retire with business justification
- **Financial Impact:** Quantified savings opportunities from each recommendation with realistic timelines
- **Implementation Roadmap:** Month-by-month action plan with owner accountability and success metrics
- **Governance Framework:** Policies and processes to prevent future waste accumulation

Why Partner with InfraTech?

We understand the challenges specific to AEC and professional services firms: complex technology stacks supporting project delivery, distributed teams managing multiple clients, and significant pressure to improve project profitability. Rather than forcing one-size-fits-all consolidation, we ensure recommendations reflect your firm's specific business model, client requirements, and strategic direction.

Many organizations uncover savings of **15-25% of current software spend** while also gaining a repeatable framework for ongoing software governance.

Engagement Options

- **Full Audit:** We conduct the complete audit process from discovery through executive reporting
- **Advisory Support:** We work alongside your internal team as a guide, leveraging your knowledge while accelerating analysis and recommendations
- **Execution Support:** We assist with renegotiations, vendor management, and implementation of recommendations

Getting Started

This checklist provides the framework for a thorough technology waste audit. Whether your organization conducts this internally or engages InfraTech for a comprehensive engagement, following the sections in sequence will ensure you don't miss important categories or opportunities.

Questions? Contact InfraTech Strategy Group for a confidential discussion about your technology spending and optimization opportunities.

Appendix: Key Metrics and Definitions

Adoption Rate: Active users in past 30 days ÷ total licenses purchased = adoption percentage
Benchmark: Tools with adoption below 30% should be considered for retirement; 50% is a warning threshold

Cost Per Active User: Total annual cost ÷ active users in past 30 days
Use to identify underutilized tools and benchmark against industry standards

License Utilization: Active users ÷ purchased licenses = utilization percentage
Identifies over-licensing and right-sizing opportunities

Total Cost of Ownership (TCO): Annual subscription cost + implementation costs + training costs + integration costs + overhead
Use to evaluate whether consolidation is worthwhile

Consolidation Payback Period: One-time implementation/migration costs ÷ annual savings = payback in years
Benchmark: 18-24 months is typical acceptable payback; anything under 12 months represents strong business case

Shadow IT: Unauthorized tools or subscriptions purchased outside central procurement
Creates security, compliance, and operational risks; should be minimized through governance