

Accounting information analyzed  
as of September 1, 2025

## Financial Oversight of Software Spend

This section provides a high-level overview of your organization's spend for the last 6 months and forecast including budgeting insights, renewals and potential savings.

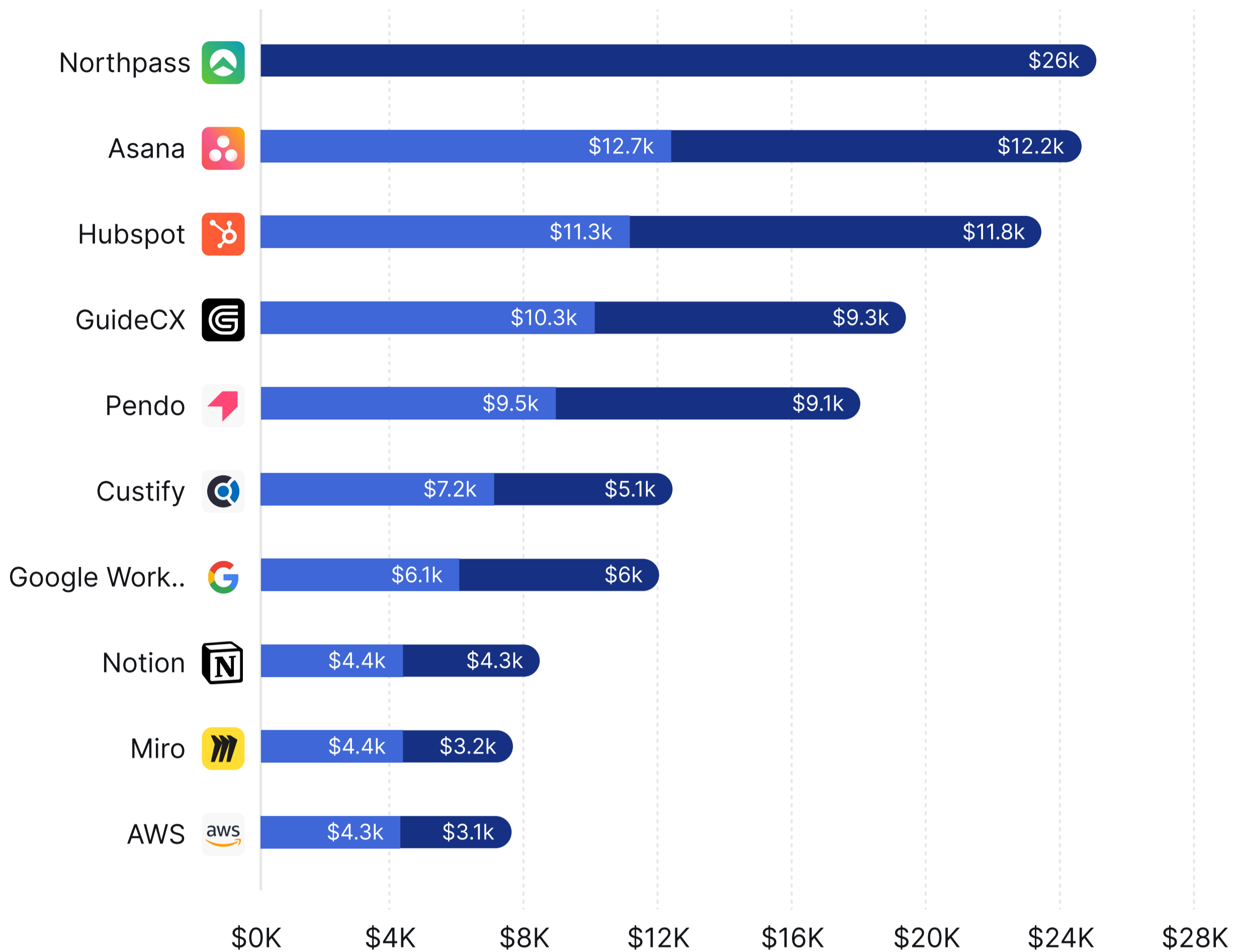


# Spend Monitoring and Control

## Top 10 Apps

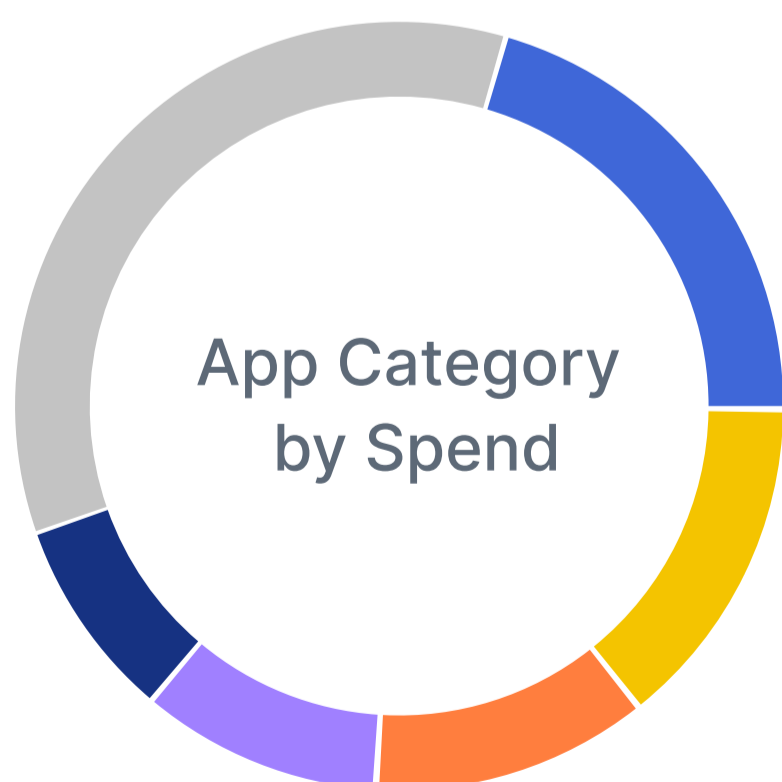
These apps are 67% of total software spend for the last 12 months

■ Last 6 months  
■ Forecasted next 6 months



## Top 5 App Categories by Spend

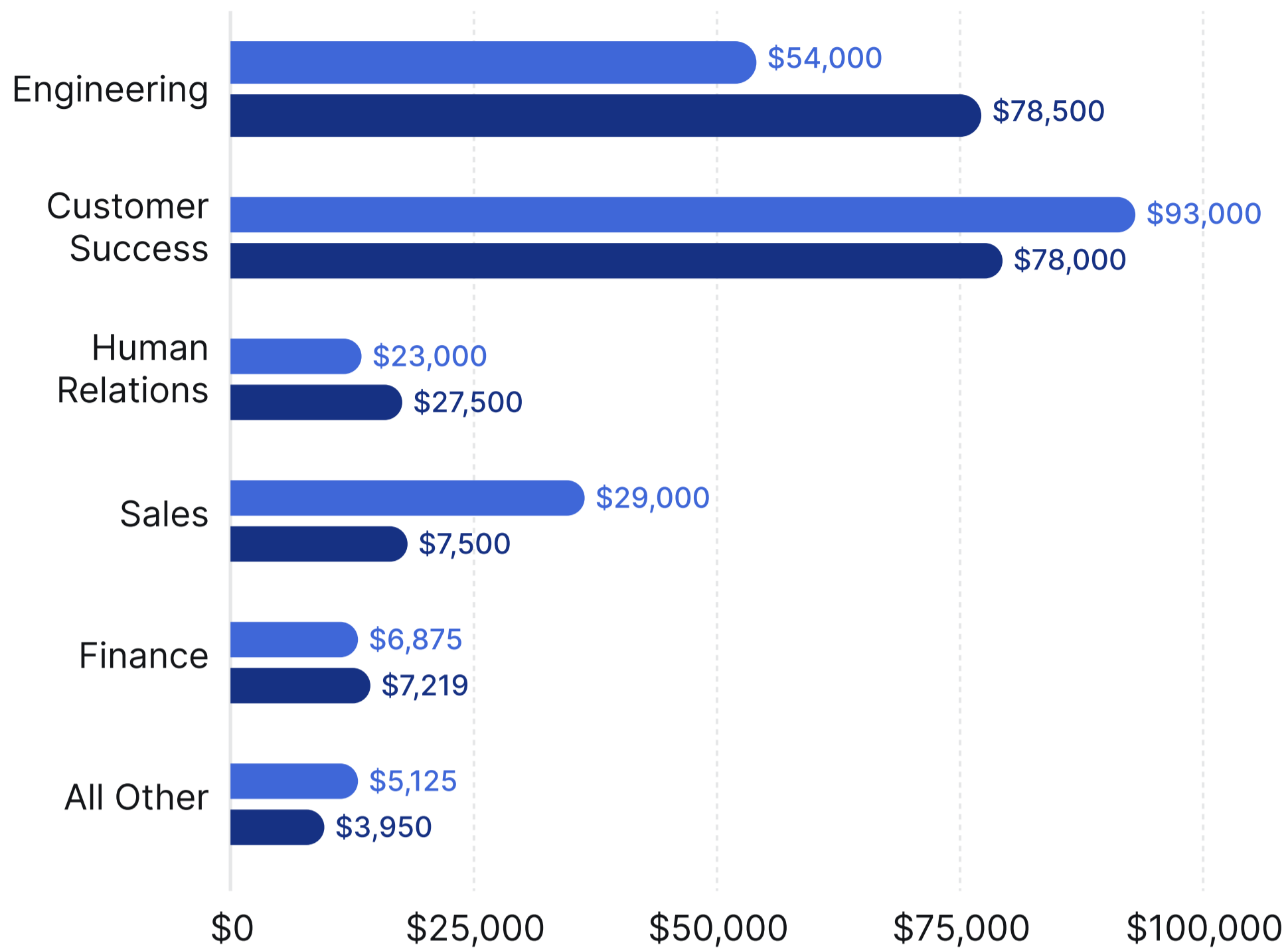
(Last 12 months)



App Category	Apps	Spend	% of Total
Project Management	7	\$46k	20.4%
Productivity and Office..	23	\$31k	13.9%
Learning Management	1	\$26k	11.4%
Customer Relationship..	5	\$22k	9.9%
Product Analytics	2	\$18k	8.3%
Others	56	\$106k	35.7%

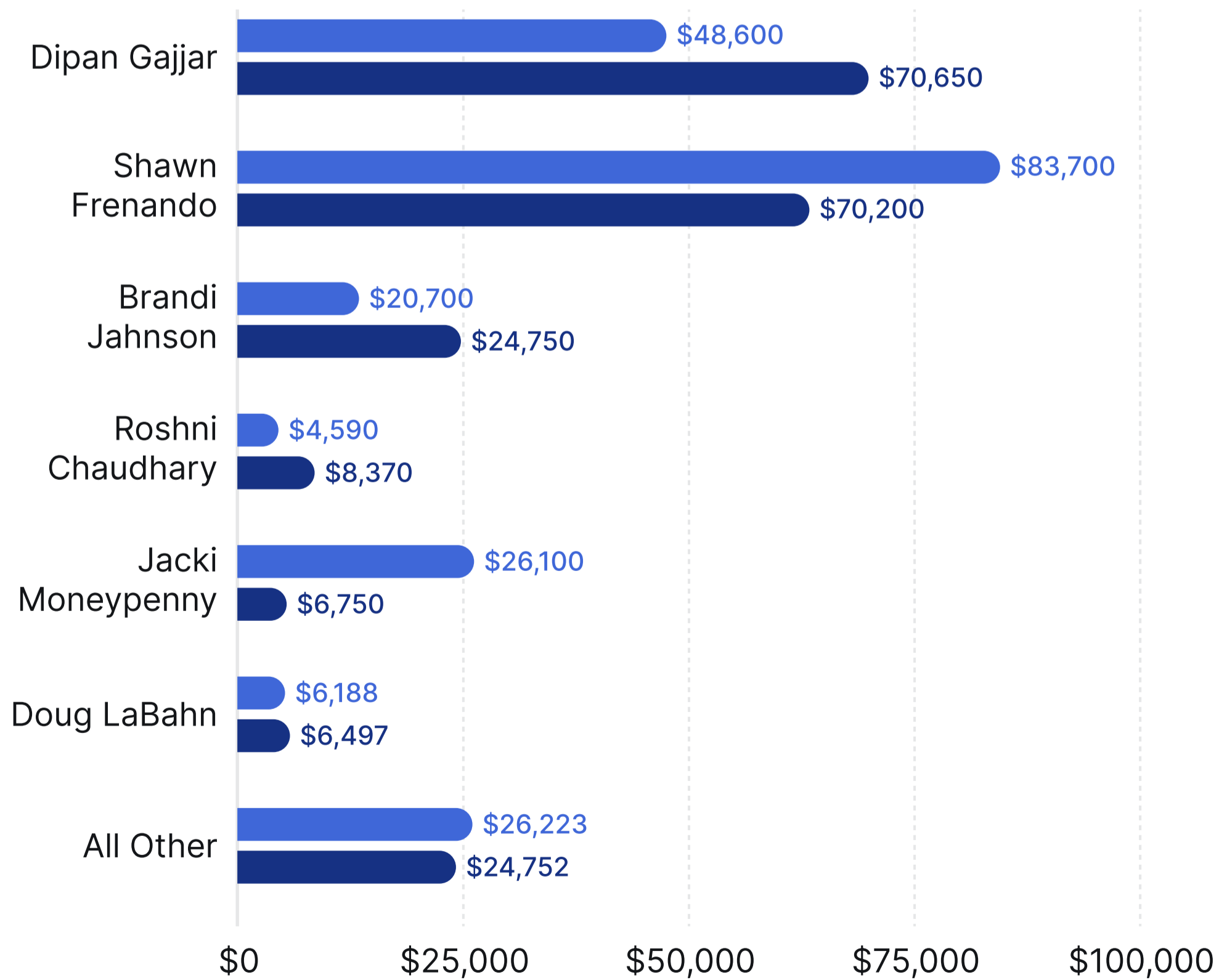
### Spend and Forecast by Department

■ Last 12 months  
■ Forecasted next 12 months

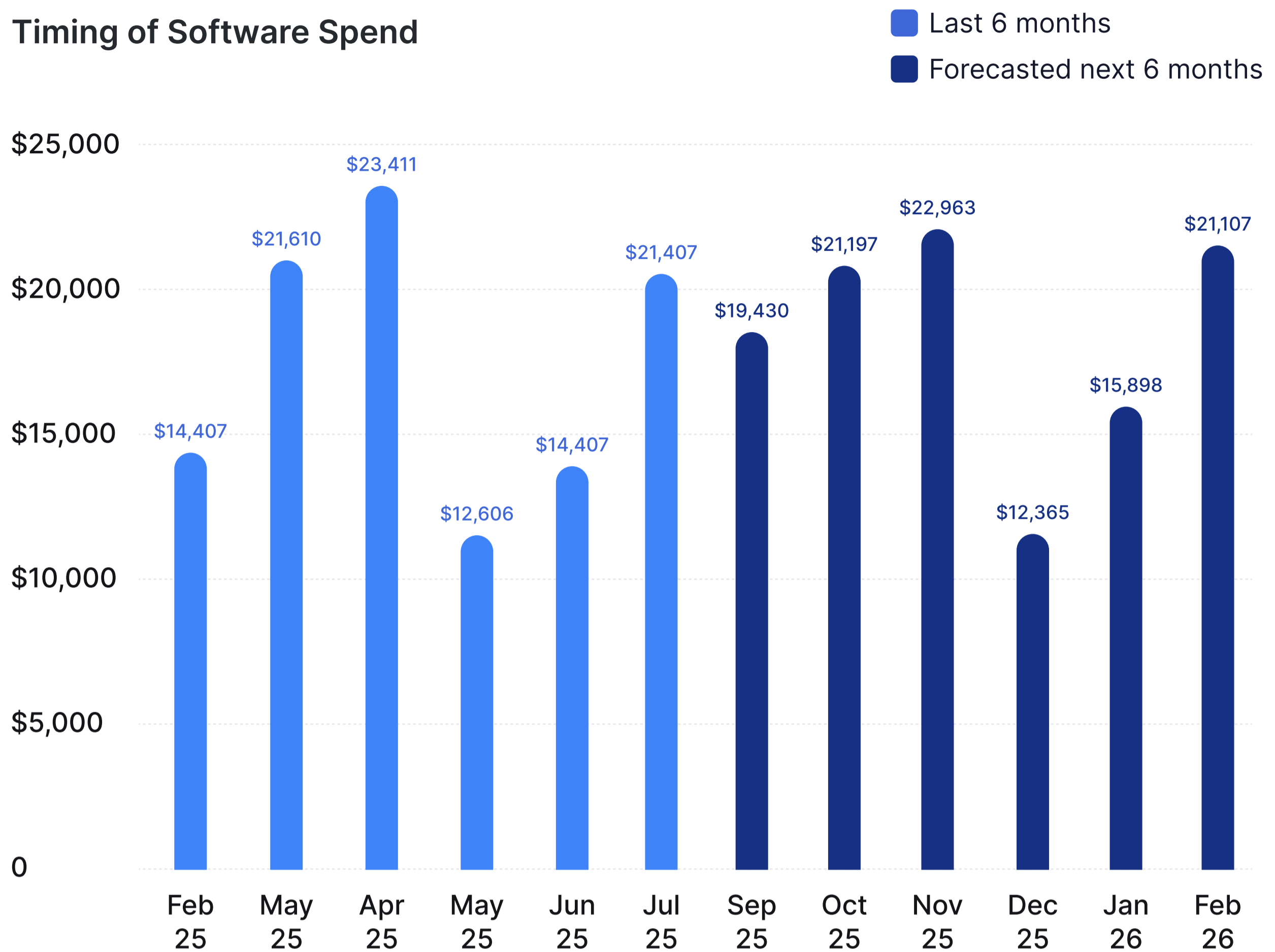


### Spend and Forecast by App Owner

■ Last 12 months  
■ Forecasted next 12 months











## Timing of Software Spend



## New Apps









(Added in Last 12 months)

Application	Date Added	App Owner	Spend Forecast (next 12 months)	User
 Northpass	Nov 20, 2024	Dipan Gajjar	\$26,650	76
 Asana	Feb 13, 2025	Shawn Frenando	\$25,450	62
 Hubspot	Apr 1, 2025	Brandi Jahnsen	\$20,580	57
 GuideCX	Jul 17, 2025	Money penny	\$20,440	48
 Pendo	Aug 20, 2025	Doug LaBahn	\$18,940	35
 Zapier	Aug 23, 2025	Shawn Frenando	\$15,300	17
 Dropbox	Aug 30, 2025	Doug LaBahn	\$11,942	12
 Canva	Sep 1, 2025	Brandi Jahnsen	\$3,000	4

























# Spend Optimization

We've identified key areas for cost savings and efficiency improvements. These insights highlight redundant applications and high-cost tools that require attention.

## The Most Significant Problematic Apps








Apps	App spend (Last 12 months)	Reason
 Northpass	\$26K	Cost per user is \$5,200
 Asana	\$25K	Annual App Price increased by 22%
 GuideCX	\$20K	Cost per user is \$3,490
 Custify	\$14K	Cost per user is \$1,204
 Pendo	\$18K	Annual App Price increased by 29%
 Notion	\$20K	High Security
 Booking	\$14K	Medium Security
 Spendflo	\$9K	Annual App Price increased by 29%

## Overlapping Apps, Candidates for

Apps	App spend (Last 12 months)	Overlaps with
 Northpass	\$26K	 TalentLMS  LearnUpon
 Asana	\$25K	 Trello  Monday.com
 GuideCX	\$20K	 Rocketlane  Onboard
 Custify	\$14K	 Gainsight  Totango
 Pendo	\$18K	 Coda  Evernote
 Zoom	\$6.5K	 Google Meet  Microsoft Teams
 Booking	\$5K	 Slack  Basecamp
 Intercom	\$10K	 zoho salesiq  LiveChat

## Applications with Low Login-Based Usage (Last 3 months)

This report breaks down App Stack Usage (Login-Based) by application and highlights apps with low login activity detected via identity providers.

Apps	No of User Without Login Activity	No of Users With Login Activity	Trust	App spend (Last 12 months)
 Northpass	112	219	Medium	\$26K
 Asana	105	157	Low	\$25K
 GuideCX	97	130	Medium	\$20K
 Custify	83	119	Medium	\$14K
 Pendo	79	89	Low	\$18K
 Notion	82	73	Low	\$20K
 Booking	67	59	Medium	\$14K

## Savings Potential



**\$36,000**

Total potential savings

**6**

Problematic Apps



**\$13,500**

Potential saving by cancelling 50% of the problematic apps

**14**

Overlapping Apps



**\$22,500**

Potential saving by cancelling 25% of the overlapping apps

To take action on these insights, please reach out to us. We can help you implement these changes and maximize your software ROI.

## Savings Achieved


Here are highlights of cancelled apps subscriptions reduce since last 12 months



# \$26,300

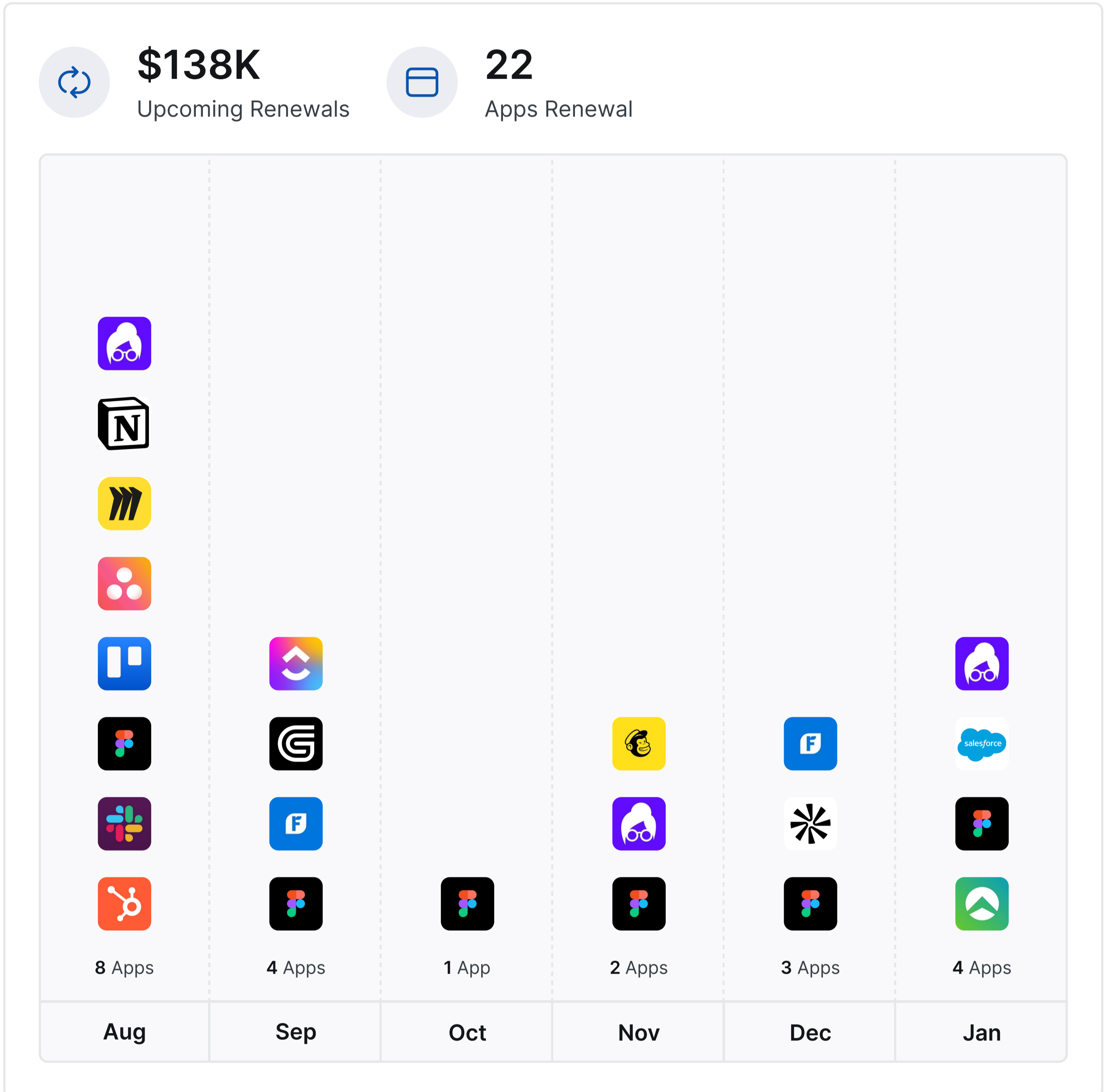
Spend savings achieved

12 Months  
(Starting 6 months ago)

Apps	Date Cancelled	App spend (Last 12 months)	Apps Category
 Northpass	Nov 20, 2024	\$26,650	Project Management
 Asana	Feb 13, 2025	\$25,450	Productivity and Office..
 Hubspot	Apr 1, 2025	\$20,580	Learning Management
 GuideCX	Jul 17, 2025	\$20,440	Customer Relationship..
 Pendo	Aug 20, 2025	\$18,940	Product Analytics

# Renewals Management

It's very important to plan ahead and not be surprised by renewals suddenly popping up in your emails. This renewal calendar shows you which renewals to prepare for over the next 6 months. We recommend a strategic review of these renewals to prepare your negotiation approach.



## Maximizing Your Software ROI





A key strategic advantage in vendor negotiations comes from a deep understanding of your actual software usage. We recommend a thorough review of your total license count against detailed utilization data. This analysis provides the key insights to right size your contracts and build a powerful, data driven negotiation plan.

# Vendor Risk and Compliance Insights

This section assesses potential risks from your software vendors, covering security compliance, unmanaged shadow IT apps, and contract status to ensure your software is secure and properly managed.






## Compliance Health Check

Here's the updated table with a traffic-light risk rating based on how completely each product covers GDPR, SOC 2, and ISO certifications.

Apps	GDPR	SOC 2	ISO	Risk Rating
 Northpass	✗	✓	✗	• High
 Asana	✓	✓	✓	• Low
 Hubspot	✓	✓	✗	• Medium
 GuideCX	✓	✗	✗	• High
 Pendo	✓	✓	-	• Medium






## Apps Pricing Updates

Here's a clear, structured summary table of the price increases and pricing model changes for the products you specified, since August 2024

Apps	Price Change Summary	Effective Date(s)
 Northpass	No public data on price increases or pricing model changes since August 2024.	Not available publicly
 Asana	Transition from legacy "Premium" and "Business" plans to seat-based "Starter" and "Advanced" plans.	Changes noted in 2025; migration in progress
 Hubspot	Implemented seat-based pricing across all Hubs, introducing Core and View-Only seats.	Rolled out March 5, 2024 (globally; March 6 in Asia-Pacific)
 GuidCX	No public info found on pricing changes or model changes since August 2024.	Not available publicly
 Pendo	No public info found on pricing changes or model changes since August 2024.	Not available publicly

## Apps Key Feature Updates

Here are highlights of major feature updates since Aug 2024

Apps	Features
 Northpass	New webhooks triggered on learner enrollment and course start, refreshed webhook management UI, enhanced Enrollments tab (direct learner/group enrollment + CSV export), customizable certificate designs with color picker, improved admin invitation email templates
 Asana	AI workflows in Smart Workflow Gallery, AI Studio for custom automations, Smart Status & Smart Digests, improved portfolio/project organization
 Hubspot	(Recent verified feature data not yet consolidated — requires lookup from HubSpot official updates)
 GuideCX	Dynamic onboarding forecasts, personalized communications at scale, advanced reporting dashboards, optimized resource allocation, strong integrations
 Pendo	Pendo AI suite (personalization, content suggestions), Pendo Predict (churn risk, lead scoring), HubSpot & Jira workflow integrations, Data Sync enhancements

## Recommendation by Advisor

### Upgrade to the Full Software Financial Review Report

This preliminary report provides a clear oversight of your organization's software spend. It's easy to upgrade to the full report. Simply introduce your IT admin person to us by having this person complete this very short online form which will be use to automatically gather and analyze what your people are really using and identify many more opportunities for optimization. Once we have completed this step, we can provide you the online portal to access all this information and manage your business more efficiently as part of our services to your business.

### Recommended Budget

Based on our analysis, we have projected an optimised software budget for your upcoming fiscal year. We recommend a target budget of: **\$XXXXX**

This budget is designed to fully support your core operational needs while maximising the value and efficiency of your software investments.