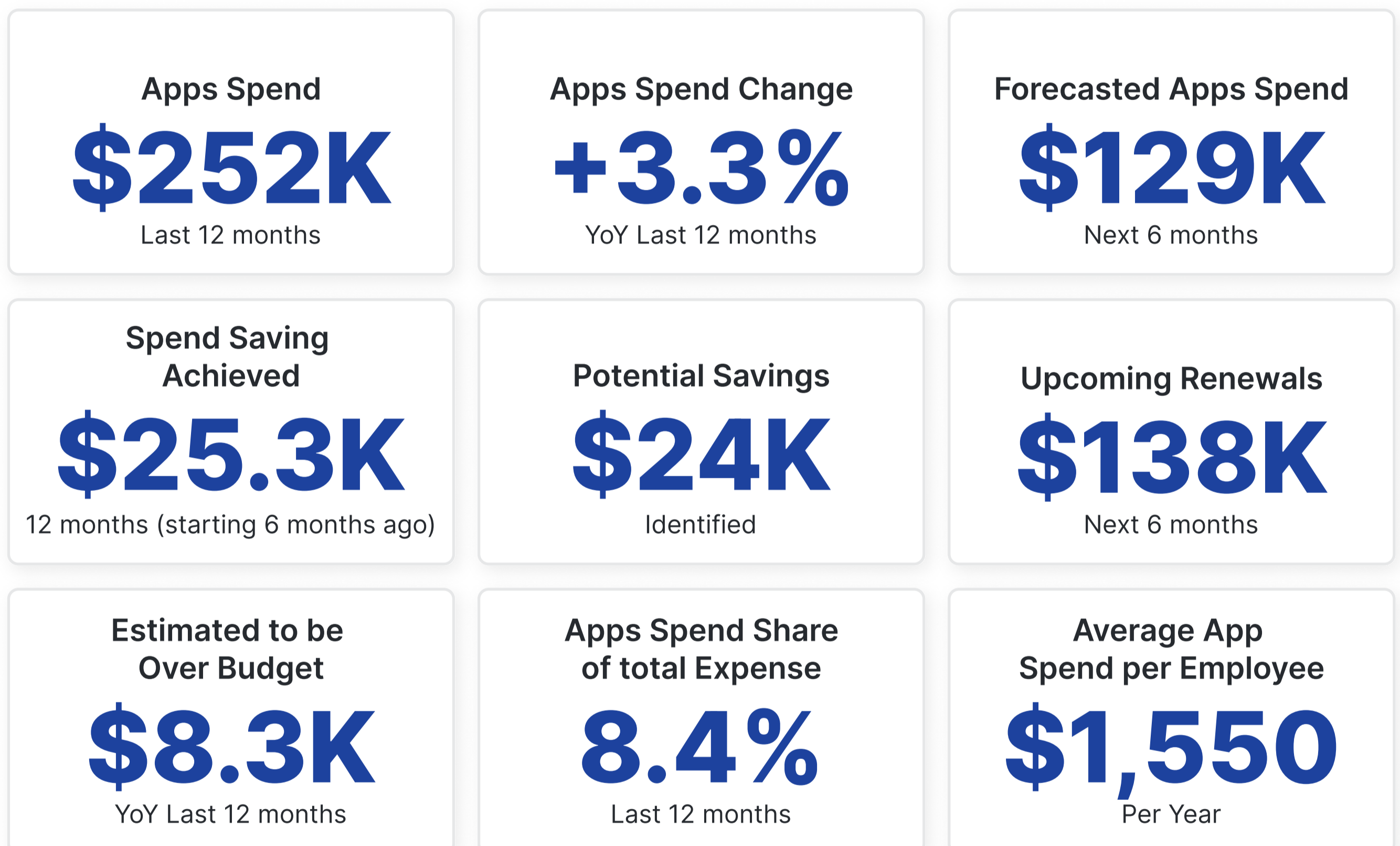


Accounting information analyzed
as of September 1, 2025

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.

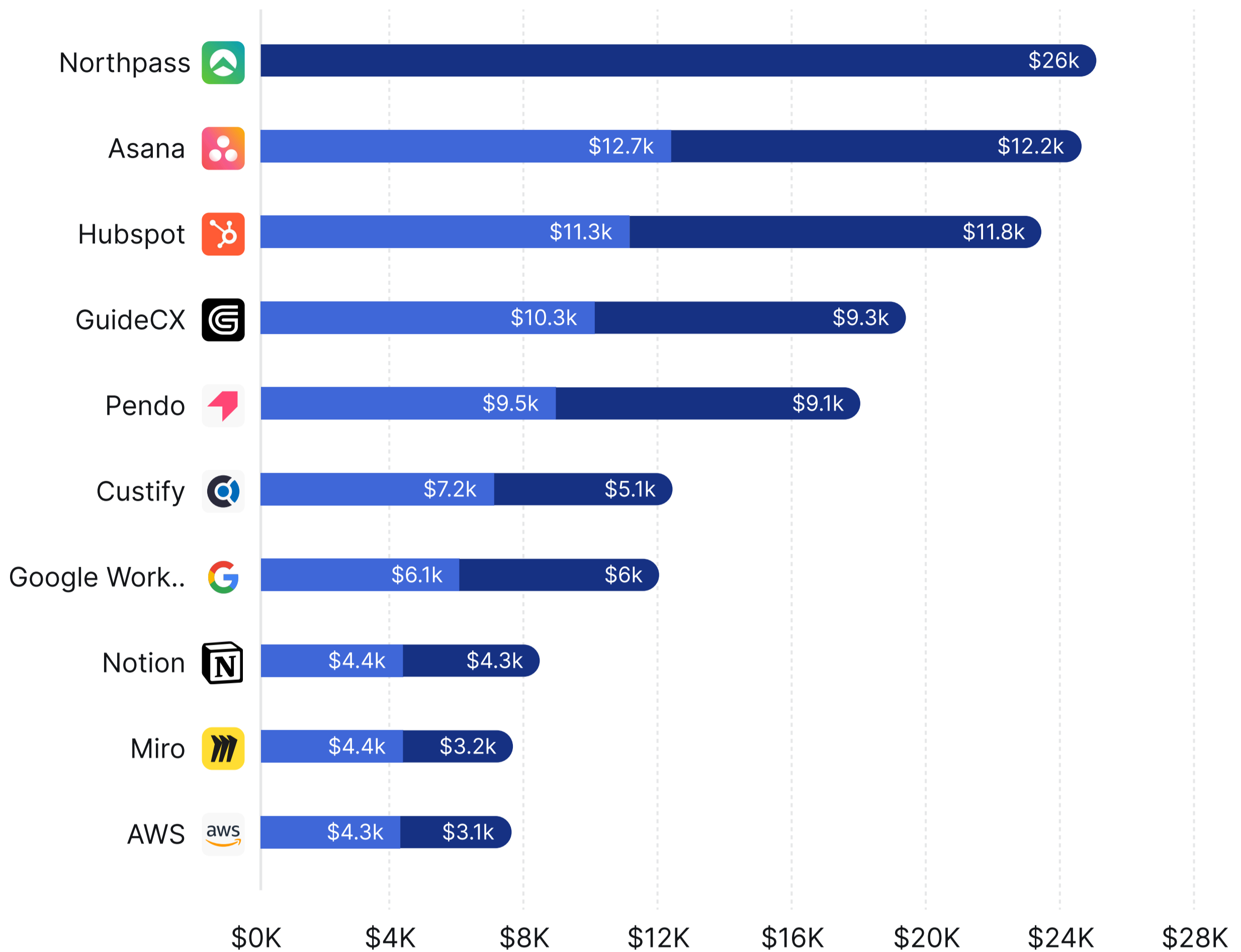


Spend Monitoring and Control

Top 10 Apps

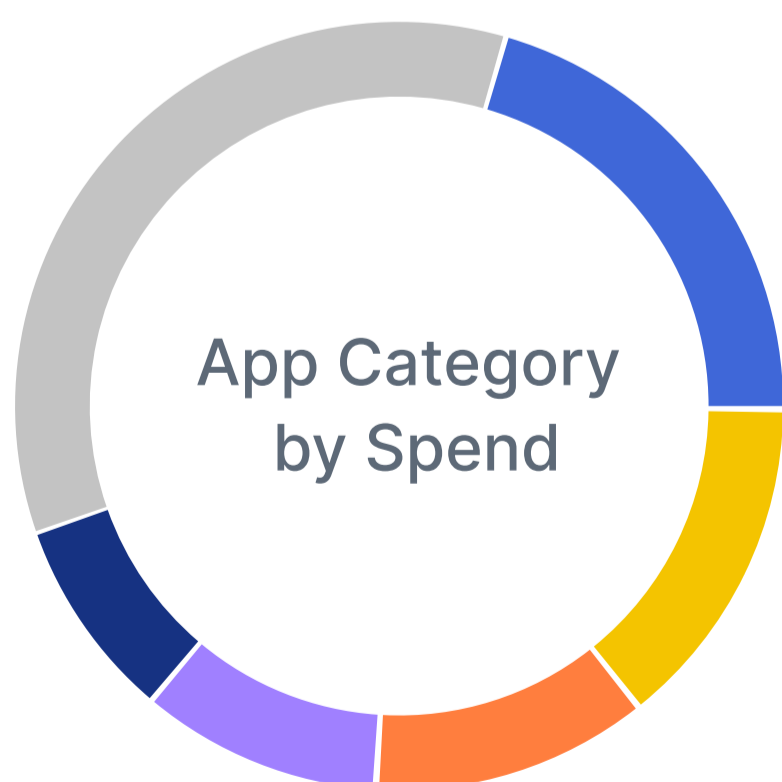
These apps are 67% of total software spend for the last 12 months

■ 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%

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

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



\$100,000

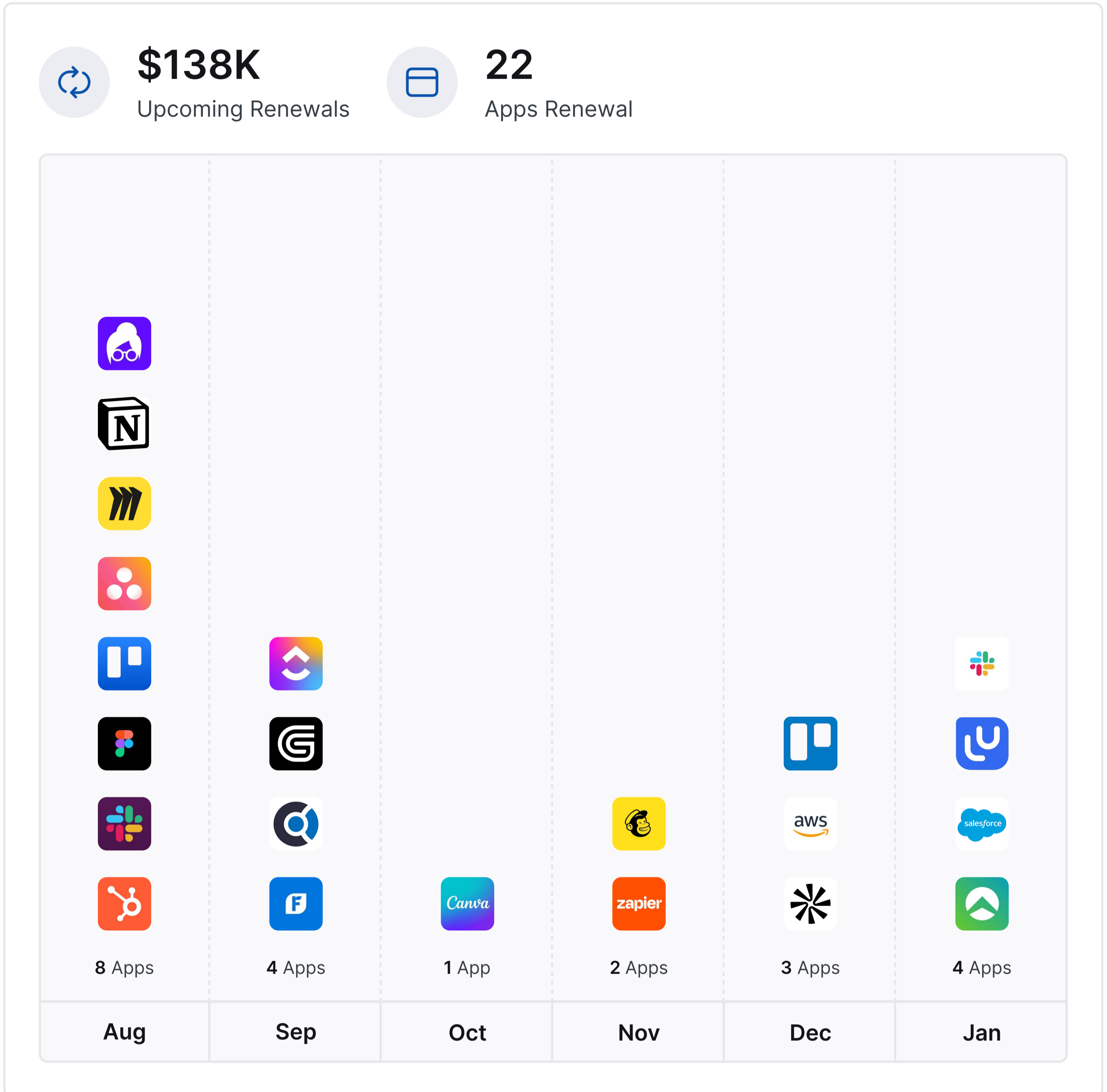
Spend savings achieved

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

Cost Optimization

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

Apps Consolidation Opportunities






\$24K

Potential Savings



9

Overlapping Apps

-  Asana
-  Hubspot
-  GuideCX

Most Expensive 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.

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.

Final Thoughts - Apps that Integrate and Meet Common Needs

For your landscaping and gardening service in Costa Mesa, California—which already uses Google Workspace and QuickBooks Online—your next app should ideally help streamline field operations, scheduling, estimating, and communications while syncing seamlessly with QuickBooks.

Here are some top recommendations, based on features that matter most to a small landscaping business like yours:

1. QuickBooks Time

A natural extension of QuickBooks, offering robust time tracking and mobile scheduling with GPS. Your crew can clock in/out from job sites—even offline—and you can monitor job status live and sync timesheets directly into payroll. Landscapers find the GPS “Who’s Working” view especially helpful for crew coordination.

Best for: Field time tracking and scheduling.

2. All-in-One Field Service / Landscape Software

These platforms combine scheduling, estimates, invoicing, crew dispatch, and QuickBooks integration into one cohesive system:

- **Jobber** – Popular with small home-service businesses; offers scheduling, quoting, invoicing, client portals, and integrates with QuickBooks.
- **SingleOps** – Tailored for outdoor service businesses; integrates tightly with QuickBooks Online.
- **TurfHop** – Lawn care-focused; syncs customers, vendors, services, invoices, payments with QuickBooks.
- **The Service Program** – Affordable, small-to-midsize oriented; schedules, manages crews, and flows data into QuickBooks.
- **Smart Service** – Strong on scheduling and mobile field operations.
- **Arborgold, Aspire, Manage360, LMN, SynkedUP, CLIP** – These offer varied strengths, such as enterprise features, design workflows, CRM, or job costing; all integrate with QuickBooks.

3. CRM + Workflow Customization: Method CRM

Method CRM is built specifically to work with QuickBooks, letting you sync estimates, invoices, customer data—and customize forms, workflows, and even a customer portal. Staff can update job statuses via mobile; once configured, it saves a ton of manual effort.

Best for: Customized workflows, CRM, automation

4. WorkWave (RealGreen) / Service Autopilot

Both are full-featured landscape and lawn-care platforms:

- **WorkWave** offers CRM, billing, marketing, drag-and-drop scheduling, route optimization, GPS tracking, on-site invoicing, and QuickBooks sync.
- **Service Autopilot** streamlines repetitive tasks, client management, and also integrates with QuickBooks.

Best for: Larger or growing operations needing powerful automation and field features.

5. Werx

A comprehensive lawn-care platform offering estimating, invoicing, crew time tracking, payments, scheduling—and full QuickBooks integration. It boasts an intuitive UI and mobile access.

Best for: A cloud-based, user-friendly, all-in-one solution.

Decision Path — What Fits You Best?

Here are highlights of major feature updates since Aug 2024

Your Primary Need	Best Option(s)
Time tracking / crew management	QuickBooks Time
Scheduling, quoting, invoicing, CRM	Jobber, TurfHop, The Service Program, SingleOps, Smart Service
Customized CRM workflows	Method CRM
Advanced ops, marketing, automation	WorkWave / Service Autopilot
Simplicity with full functionality	Werx

If you're just getting started:

- Try **QuickBooks Time** to see immediate improvements in payroll and crew visibility.
- For an all-around management upgrade, **Jobber or Werx** offer great entry points with solid QuickBooks integration and mobile tools.

If you're scaling or need more automation:

- Look at **WorkWave, Service Autopilot, or Method CRM** depending on whether your priority is automation or workflow flexibility.
-

Final Thoughts

Start with the tool that solves your most pressing pain point today—likely time tracking or field scheduling—then build from there. Most of these platforms offer free trials or demos, so you can test directly how they mesh with your QuickBooks setup.

Let me know which area you might focus on first, and I'd be happy to help compare those options in more detail!