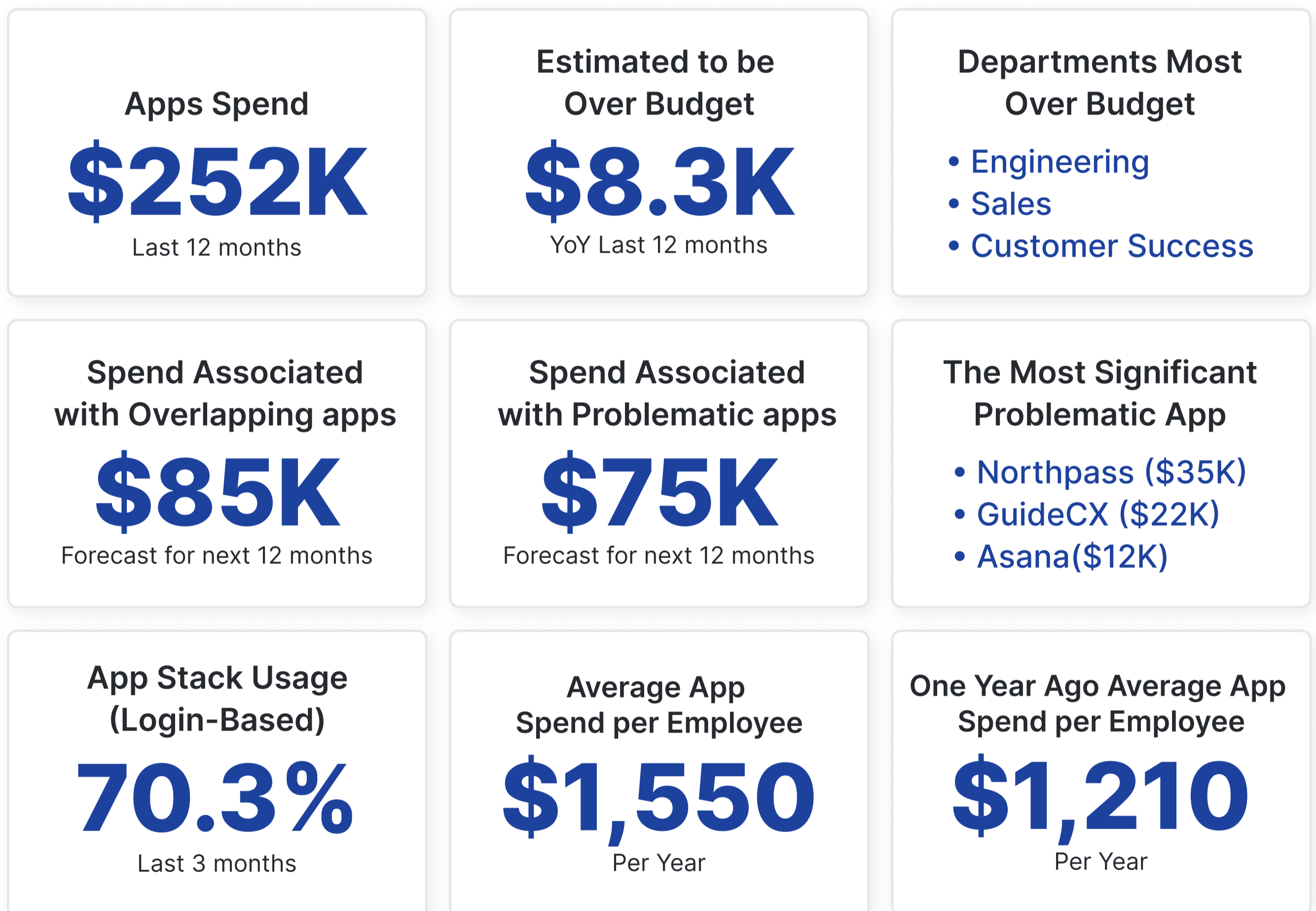


Accounting information analyzed  
as of September 1, 2025

## Big Picture System Indicators

This section provides a high-level overview of your organization's spend for the last 12 months and budget adherence, alongside operational efficiency metrics.



# System Changes and Procurement Pipeline

This section looks at the evolution of your software stack, outlining recently added and removed applications, and summarizes the specific business value delivered by new applications.

## App Removed

# 15

Last 12 months






## App Added

# 8

Last 12 months






## App Removed

(Removed in Last 12 months)

Apps	Date Cancelled	App spend (Last 12 months)	Apps Category	User
 Northpass	Nov 20, 2024	\$26,650	Project Management	82
 Asana	Feb 13, 2025	\$25,450	Productivity and Office..	46
 Hubspot	Apr 1, 2025	\$20,580	Learning Management	43
 GuideCX	Jul 17, 2025	\$20,440	Customer Relationship..	38
 Pendo	Aug 20, 2025	\$18,940	Product Analytics	18




## New Apps

(Added in Last 12 months)

Apps	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

## Apps Added: Value to the Business









Summary of automations & Enhancements by recently added applications.

Apps	Key Automations / Enhancements	Manual Process Replaced or Improved	Value to Business
 Asana	<ul style="list-style-type: none"> <li>- Automated task assignment &amp; due dates</li> <li>- Workflow templates for recurring projects</li> <li>- Real-time project tracking &amp; dashboards</li> <li>- Automated reminders &amp; status updates</li> </ul>	<ul style="list-style-type: none"> <li>- Manual task tracking in spreadsheets or email</li> <li>- Ad hoc status meetings to get updates</li> <li>- Re-creating project plans each time</li> <li>- Sending follow-up emails</li> </ul>	<ul style="list-style-type: none"> <li>- Saved time for project managers</li> <li>- Improved accountability &amp; visibility</li> <li>- Reduced missed deadlines</li> <li>- Faster project ramp-up with templates</li> </ul>
 Notion	<ul style="list-style-type: none"> <li>- Centralized documentation/ workspaces</li> <li>- Linked databases (projects, tasks, OKRs)</li> <li>- Shared templates for onboarding, SOPs</li> <li>- Real-time collaborative editing</li> </ul>	<ul style="list-style-type: none"> <li>- Scattered documents across Word, Excel, email</li> <li>- Multiple versions of files with version confusion</li> <li>- Manual onboarding via emailed docs</li> <li>- Knowledge silos across teams</li> </ul>	<ul style="list-style-type: none"> <li>- Reduced search time for information</li> <li>- Consistent onboarding process</li> <li>- Fewer duplications and errors</li> <li>- Increased collaboration across teams</li> </ul>
 Pendo	<ul style="list-style-type: none"> <li>- In-app surveys &amp; feedback collection</li> <li>- Automated user onboarding/ guides</li> <li>- Feature usage tracking &amp; analytics</li> <li>- NPS surveys directly inside product</li> </ul>	<ul style="list-style-type: none"> <li>- Manual customer surveys via email</li> <li>- Customer success 1:1 training sessions</li> <li>- Guesswork on feature adoption</li> <li>- Separate survey tools requiring data consolidation</li> </ul>	<ul style="list-style-type: none"> <li>- Reduced load on Customer Success</li> <li>- Faster user adoption of features</li> <li>- Data-driven product roadmap</li> <li>- Improved customer experience &amp; retention</li> </ul>

# 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	\$9K	Annual App Price increased by 29%
 Notion	\$20K	High Security
 Booking	\$14K	No evidence that anyone is using this app
 Spendflo	\$9K	Annual App Price increased by 29%

## Overlapping Apps, Candidates for

Each row represents a single category and subcategory of apps with similar functionality

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	\$9K	 Coda  Evernote
 Zoom	\$6.5K	 Google Meet  Microsoft Teams
 Booking	\$5K	 Slack  Basecamp

## 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

# 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
 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

## Customer Data Management Policies

Apps	Data Use & Processing	Data Retention & Deletion	Compliance & Customer Rights
 Northpass	Uses Customer Data to provide the learning management service; analytics for program improvement. Collects personal info via forms, usage, etc., when users or customers interact with the service.	Data retained only as needed for service; deletion upon request or per agreed terms. Customer responsible for deactivating accounts when no longer needed.	Supports privacy rights (opt-out, deletion) under applicable laws; operates under a Privacy Policy that defines controller vs. processor roles.
 Asana	Data is used to run, support, and improve the service; supports features like project privacy, data export, security. Provides tools and settings for data privacy and access control.	Customers can export data; Asana follows retention/disposal policies per agreements and privacy/security documentation. Deletion upon customer request or per policy.	Provides rights in privacy policy: access, correction, export, deletion; complies with relevant laws (GDPR, etc.); supports project privacy controls.
 HubSpot	Processes personal data for services, marketing, analytics, workflows; supports customer usage of features where they process their own data. Customer controls usage.	Retains data according to terms/policy; customers or individuals may request deletion, correction, export. Data stored/transferred under standard contract clauses where needed.	Strong rights under GDPR, CCPA, etc.; privacy policy defines roles, rights, controller/processor distinction. Data Processing Agreement applies in contracts.

## Customer Data Management Policies

Apps	Data Use & Processing	Data Retention & Deletion	Compliance & Customer Rights
 GuideCX	Uses data for service, onboarding, integrations (e.g., with HubSpot), hosting, backups; ensures security through technical & organizational measures.	Clauses for deletion or return of personal data after contract/termination; customers may request deletion. DPA describes handling of data post-termination.	Complies with EU & UK Data Protection Laws, CCPA; rights to access, correction, deletion. Maintains audit/report summaries under DPA; ensures confidentiality.
 Pendo	Uses data for analytics, user guidance, in-product feedback, and service features. Data collected, encrypted in transit/at rest, stored in multi-tenant environment with logical separation.	Data retention per customer contractual terms; customers can delete/export as needed. Supports granular access controls.	Complies with SOC2, GDPR, HIPAA, TX-RAMP; customers have rights under privacy law; features for role-based permissions, privacy/compliance training.

**% Contracts in AppVentory**

**23%**

As of Aug 26, 2025

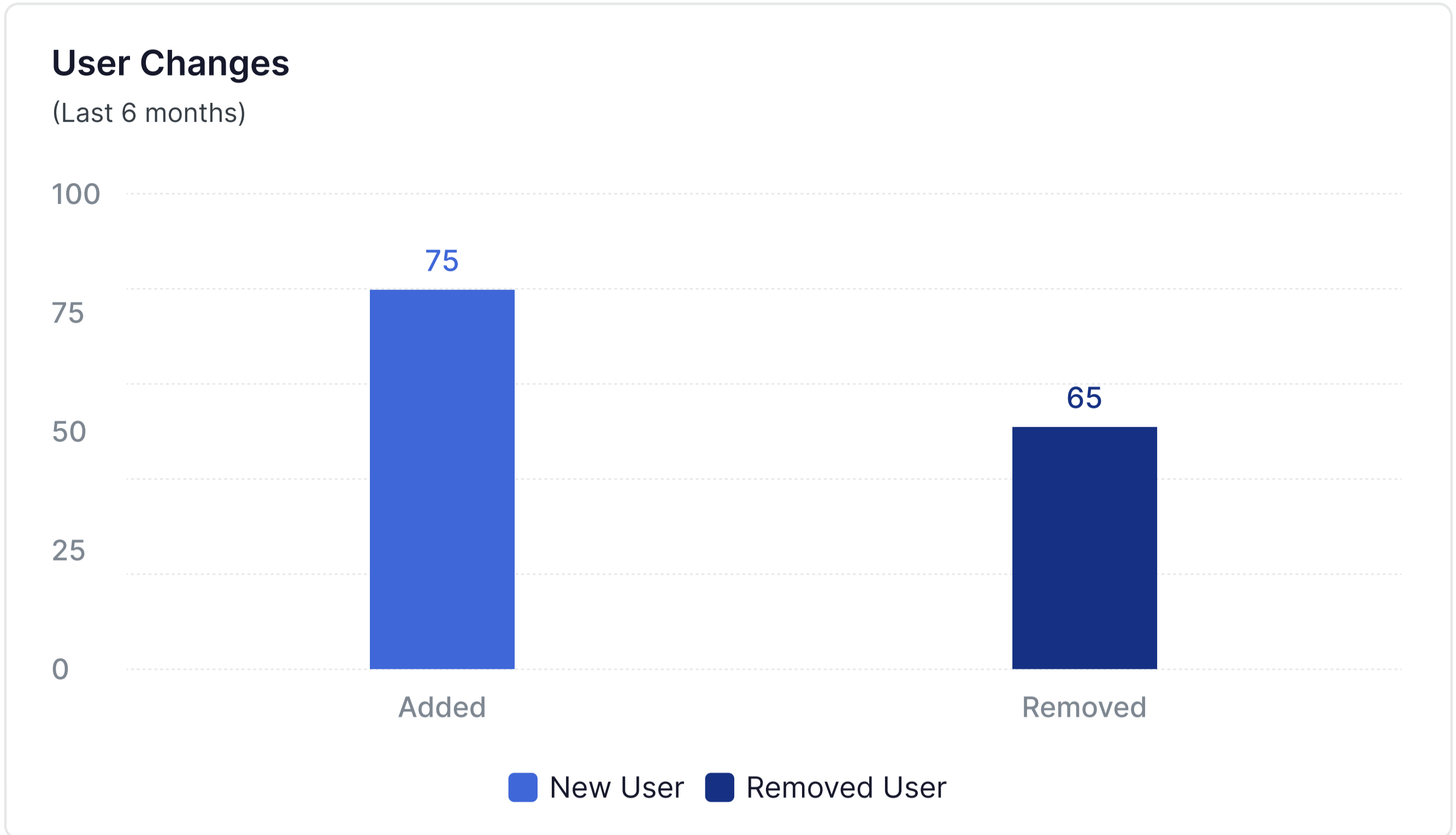
**% Apps with Contracts Longer than 12 Months**

**5%**

As of Aug 26, 2025

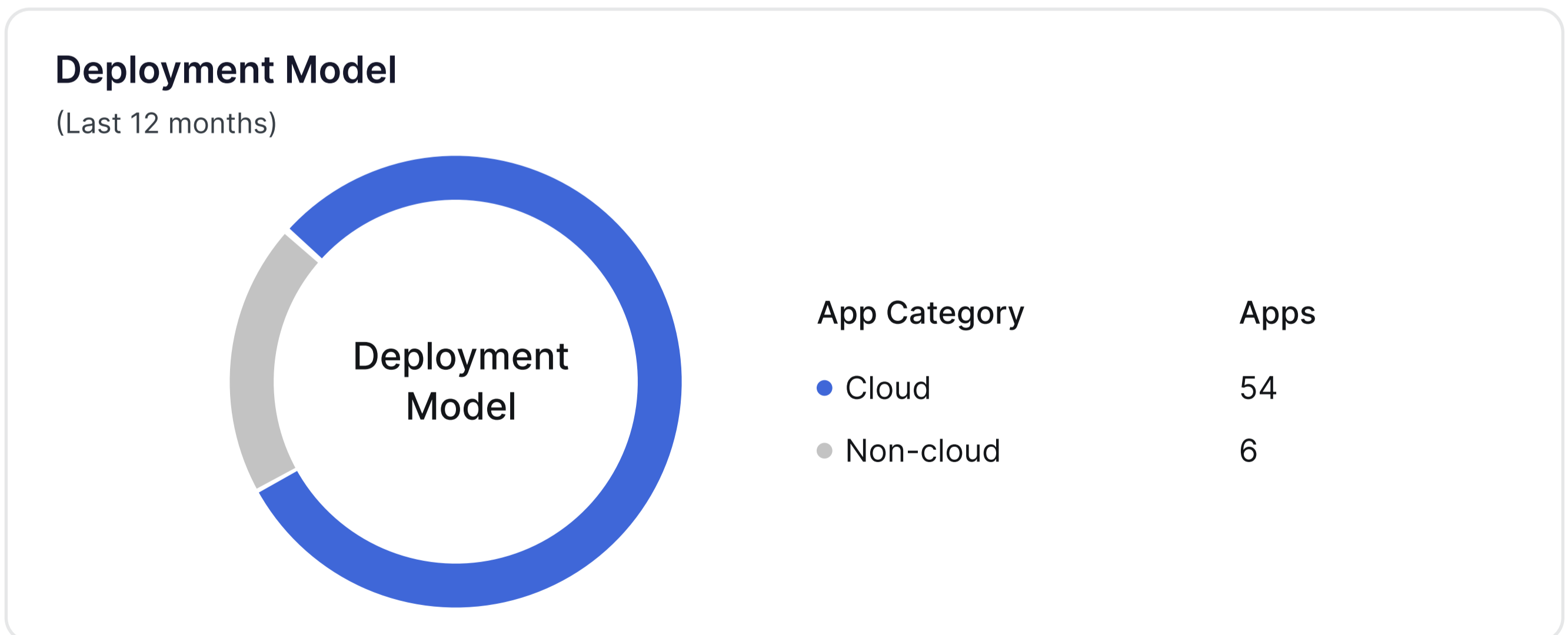
# User Access Management

This section highlights license efficiency showing usage levels, and how quickly users are being added or removed from systems.



# Systems Risks

This section provides an overview of your applications portfolio, categorising applications by deployment type (cloud vs. on-premise) and identifying risky applications to support modernization.



# Software Landscape and Priority Initiatives

This section analyzes your applications portfolio, highlighting the top 10 applications by spend and their user sentiment, alongside actionable initiatives to optimize your stack.

## Top 10 Apps

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

Apps	App Spend (Last 12 months)	Number of Users (As of date)	Overall app Performance Rating by user	% of Users Rating Apps
 Northpass	\$26k	35	★ 3.5	37%
 Asana	\$12.2k	89	★ 2	28%
 Hubspot	\$11.8k	72	★ 4	29%
 GuideCX	\$9.3k	32	★ 2	39%
 Pendo	\$9.1k	19	★ 1	27%
 Custify	\$9.1k	29	★ 4	45%
 Google Work..	6k	130	★ 3	57%
 Notion	\$4.3k	45	★ 2.5	39%
 Miro	\$3.2k	39	★ 4.5	83%
 AWS	\$3.1k	10	★ 3.5	33%


## Priority Initiative #1

### Consolidate Overlapping

This initiative compares functionally overlapping applications to highlight the potential savings achieved by consolidating to a single vendor.


Customer Relationship Management

Sales and marketing CRM

 Hubspot  Freshworks

Potential Savings  
\$22.58K


Total Annual Cost  
\$28.44K

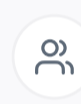
Confidence Score (This reflects Appventory's confidence in overlap analysis.)  
85% 

#### Comparison Details

##### Hubspot

HubSpot offers a full platform of marketing, sales, customer service, and CRM software to help businesses grow.

 Annual Cost  
\$22.58K

 Users  
87


 Department  
NA


##### Features

- Calendar Integration
- Contact Management
- Email Marketing
- Lead Management
- Reporting and Analytics
- Sales Pipeline
- Task Management
- Third-Party Integrations
- Workflow Automation

##### Freshworks

HubSpot offers a full platform of marketing, sales, customer service, and CRM software to help businesses grow.

 Annual Cost  
\$22.58K

 Users  
87

 Department  
NA


##### Features


- Calendar Integration
- Contact Management
- Email Marketing
- Lead Management
- Reporting and Analytics
- Sales Pipeline
- Task Management
- Third-Party Integrations
- Workflow Automation

##### Jasper AI

HubSpot offers a full platform of marketing, sales, customer service, and CRM software to help businesses grow.

 Annual Cost  
\$22.58K

 Users  
87

 Department  
NA

##### Features

- Calendar Integration
- Contact Management
- Email Marketing
- Lead Management
- Reporting and Analytics
- Sales Pipeline
- Task Management
- Third-Party Integrations
- Workflow Automation











#### Appventory AI Recommendation











80% of similar organizations prefer HubSpot for comprehensive CRM needs.

- We recommend considering HubSpot as the primary CRM tool.
- HubSpot offers a more robust set of features for marketing automation and team collaboration, providing a better user experience.
- Additionally, it has a wider range of integrations and a stronger community support ecosystem.

# Backlog of potential projects to improve business systems

This section outlines a strategic backlog of modernization projects. It identifies critical opportunities to replace high risk applications with secure alternatives and migrate legacy non cloud applications to cloud based solutions.

High Security Risk Applications	
Apps identified as high security risk	Alternative secured app
 Northpass	 Notion
 Asana	 Clickup
 Hubspot	 Pendo
 GuideCX	 Mailchip
 Pendo	 Postman

Non-cloud Applications	
Non-cloud App	Alternative cloud App
 Northpass	 Notion
 Asana	 Clickup
 Hubspot	 Pendo
 GuideCX	 Mailchip
 Pendo	 Postman