Auditing and Benchmarking Software as a Service (SaaS) Applications

ROBERT LEE HARRIS, COMMUNICATIONS ADVANTAGE, INC.

Ten Years Ago Today:

The Most Common SaaS Subscriptions

Core Business Apps

Specialized Apps

Today: Different SaaS Stacks for Every Division in Every Industry *(Example: 1 Company, 97 products)*

Office-Admin (31) — Microsoft, ORACLE, DocuSign, workday, smartsheet, cornerstone, KRONOS, slack

Back Office-IT (8) — SOLARWINDS, dbt, CloverDX, STIBO SYSTEMS MASTER DATA MANAGEMENT, OneTrust, RAPID7

Customer Service (6) — 8x8, salesforce, qualtrics, zowie, sprinklr

Marketing (26) — cvent, twilio, pepperjam, yelp, Adobe, esri THE SCIENCE OF WHERE

Supply Chain (7) — Cleo, onfleet, akeneo, ptc, vector

Retail eCommerce (7) — SAP Hybris, SALSIFY, bloomreach, FORTER

Retail Stores (12) — Honeywell, Theatro a Motorola Solutions Company, ServiceChannel, PROFITECT, SiteZeus

The more specialized the applications, the less you know:

About the Products
Example: A company might use Cleo for B2B data integration and Onfleet for last-mile delivery management. The result: no single person understands the entire flow of product movement from supplier to doorstep.

About the Process –
Example: For retail eCommerce, each product handles a sliver: Hybris (commerce platform), Salsify (product content), Bloomreach (site search/UX), Forter (fraud prevention).

About the People
Example: Theatro (voice-based team communication) and ServiceChannel (facilities management).   These tools manage specific operational needs. The IT team may never meet store associates using Theatro. Facilities vendors may have a separate procurement relationship behind ServiceChannel's portal.

Organizing SaaS Applications

Product Name	Who Owns it?	Who uses it?	What is it for?	Where is it connected?
Vendor and product name.	The division or department that is the primary owner of the product.	The product may be used by a broader worker base than the primary owner	The functionality and potential functionality of the product. Important for consolidation.	Other systems that are either dependent on the product or the product is dependent on.
Example: Salsify PXM	*Retail eCommerce Director*	*E-Commerce Team Product Marketing Sales Operations*	*Manage and distribute product data and images so that when a customer sees a product online, the content is complete, up-to-date, and persuasive.*	*Online stores Oracle ERP*

Foundational Audits

Key targets: Office suites, ERP systems (products used by <u>all</u> office workers)

✓ Easiest to start with

✓ Most common savings opportunity: Employees not offboarded correctly

Audit methodology

Three Questions

Should we even have it?	Are we paying the right amount for it?	What's the best way to use it?
Inventory	**Benchmark**	**Optimize**
Identify and validate all services and subscriptions	Verify contract compliance.	Look for redundant functionality.
	Identify best market rates for high volume services	Look for underused functionality

Case Study

Microsoft 365 Audit

Users were automatically onboarded to F3/F5 Combo, when upgraded to an E5 group, these F3/F5 licenses remained.

Multiple users ID'd with no email or login access for months.

Also checked Teams, since some F3 users did not use email.

Large number of unused Visio licenses

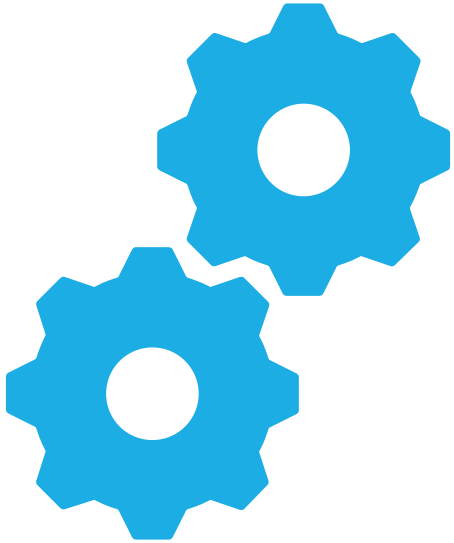Number of E5 users with blocked credentials

Resulted in 15% Savings

Off boarded user credentials cross-references with HubSpot, and Adobe – ID'd additional old credentials for more savings!

Specialized Applications

One-size-fits-all audits fail in complex SaaS environments:

- Focus on usage patterns and license allocation relevant to the business function (e.g., over-licensed CAD tools in supply chain vs. underutilized compliance software in legal).
- Include data flow mapping: understanding how information moves between tools (e.g., legal document retention flowing into HR or procurement systems).
- Account for regulatory environments: such as GDPR for legal platforms or PCI compliance for retail eCommerce systems.

Optimization must match platform intent, for example:

- Legal tools: Optimized for risk reduction and compliance assurance—not always cost-cutting
- Retail platforms benefit from consolidation and simplification, reducing tool sprawl
- Supply chain platforms require latency reduction, data synch, and supply-side visibility

Strategy includes:

- Rationalizing redundant tools
- Renegotiating pricing tiers based on usage

Building Stakeholder Trust

Lesson from Honda (and others): "At Honda we have a philosophy called Genba, which means 'go to the spot', bringing the students to Honda to see the production facility first-hand incorporates that philosophy."

Collaboration with application owners: They are the SMEs and will know the product competitors.

→

You will need to focus on listening and learning before suggesting changes.

→

Balancing performance and cost: Cost savings do not matter if they increase risk or diminish productivity.

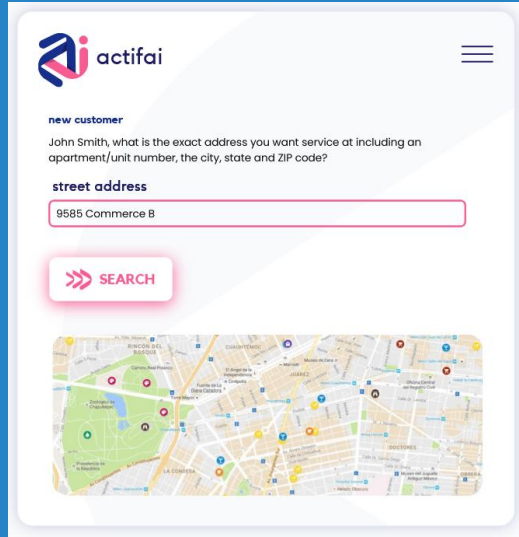HANDLING MISSION-CRITICAL APPLICATIONS

NEGOTIATION AND LICENSING TACTICS

MAXIMIZING ROI WITHOUT SWITCHING PLATFORMS

When Change Isn't an Option

Case Studies

Specialized Locator Apps for ISPs:

Actif.ai and KorTerra

Actif.ai is a prequalification app for Broadband service. KorTerra is a ground utility line detector

Benchmarks showed that rates were competitive for both services

KorTerra per-ticket commitment was much higher than other companies and underutilized by 65%

Negotiated lower commitment at slightly higher per-ticket rate for 30% savings

Actif.ai was embedded in website for customer self service and available to sales.

Use of Actif.ai for website was right-sized for self-service, but not used by sales. Monitoring adoption prior to new contract.

Visibility and Accountability

TOOLS AND TECHNIQUES TO IDENTIFY ALL SAAS IN USE

USAGE TRACKING AND REPORTING

COMMUNICATING IMPACT TO LEADERSHIP

Application Name	Owner/Dept	Function	Monthly Cost	Licenses	Utilization Rate	Notes / Risks	Savings Potential	Recommended Action
Microsoft 365 E5	IT	Productivity Suite	$12,000	150	72%	35 users only use email + Teams	20–30%	Downgrade unused E5 to E1 or F3
Zoom	HR	Video Conferencing	$1,800	45	50%	Redundant with Teams	40–60%	Consolidate into Teams
Smartsheet	Operations	Project Mgmt	$2,200	60	65%	No central ownership	15–25%	Review overlap with MS Planner
DocuSign	Legal	eSignature	$1,600	30	85%	Strong adoption	0–5%	No changes; negotiate renewal
Slack	Dev/IT	Messaging	$3,500	80	35%	Partial Teams overlap	20–40%	Rationalize Slack vs Teams
Salesforce	Sales	CRM	$18,000	40	95%	Tier-1 system	0–10%	Optimize add-on licenses
Zendesk	Support	Helpdesk	$4,000	20	60%	Used by Tier 1 only	10–20%	Review tiered access & seats
Miro	Marketing	Whiteboarding	$900	25	20%	Unused since pandemic	60–80%	Decommission or reduce seats
Workday	HR	ERP / HRIS	$9,500	Org-wide	90%	Critical system	0–5%	Monitor but retain full access
Bit.ly	Marketing	Link Tracking	$300	5	15%	Free alternatives exist	80–100%	Replace with free version

Thank you

Contact: Robert Lee Harris,

robert.harris@comadvantage.net

(800) 765-9497