30 days

The SaaS Estate Rebuild Checklist

For reconstructing your SaaS inventory, spend, and renewal calendar after losing your system of record. Vendor-neutral: it works whether you replace that system with another platform, a spreadsheet, or nothing yet. **Assign the four source pulls to four different people and run them in parallel** — that's the difference between a 30-day rebuild and a 90-day one.

BEFORE YOU START, AGREE ON TWO THINGS

What counts as one app

Does the Atlassian suite count as one row or three? Pick a rule and write it at the top of your sheet. Changing it in week three means redoing the dedupe.

What "good enough" means

You are not going to hit 100%. Coverage of your top 50 apps by spend is worth more than a complete list of 400 apps you can't act on.

THE 30 DAYS

WEEK 1

Pull, and triage renewals in parallel

Don't sequence these. Renewal triage starts the moment the finance and contract pulls are underway, because renewals inside 90 days won't wait for a complete inventory.

1 Identity provider

Fastest path to your sanctioned app list

`IAM / IT Ops · ½ day`

- [ ] **Okta:** export Applications with assignment counts, then the System Log filtered to `user.authentication.sso`, last 90 days.
- [ ] **Google Workspace:** Reporting → Audit and investigation → SAML log events. Pull the Token/OAuth log too; it catches more than SAML alone.
- [ ] Note apps with assignments but near-zero sign-ins. That gap is your first reclamation list.
- [ ] **Entra ID:** export Enterprise Applications, then Sign-in logs for the last 90 days — check your retention tier first.
- [ ] Capture per app: **app name, unique active users, total assigned users, last sign-in date.**

⚠ **Trap:** sign-in log retention is often 7–30 days by license tier. Export somewhere durable *today*. Those days do not come back.

Misses: anything not behind SSO — card-bought departmental tools, free tiers, local logins, and most AI tools adopted in the last 18 months.

2 Finance systems

Your only real source for spend

`Finance / Procurement · 1–2 days`

- [ ] Pull **24 months** of vendor-level spend from AP / ERP (NetSuite, Coupa, Workday, Oracle).
- [ ] Filter on software and subscription GL codes — **then scan uncoded vendors anyway.** That's where the surprises are.
- [ ] Flag card descriptors for cleanup (`ADOBE *ACROPRO`, `MSFT * E5`).
- [ ] Pull card and expense feeds separately (Ramp, Brex, Amex, Expensify, Navan). These rarely reconcile to AP.
- [ ] Flag resellers and marketplaces that mask the real product: AWS Marketplace, SHI, Insight, Carahsoft, Softwareone.
- [ ] Capture per vendor: **annualized spend, billing frequency, payment method, cost center, first-seen date.**

⚠ **Trap:** annualized spend from a monthly card charge is not a negotiated annual contract value. Mark which is which — you'll quote these to Finance.

Misses: anything free, and anything paid by a business unit outside your visibility.

3 Contracts and email

Where your renewal calendar comes from

Procurement / Legal ops · 1–2 days

- [ ] Export the completed-envelope list from DocuSign / Adobe Sign / Ironclad, last 36 months.
- [ ] Search the contracts drive and the procurement + AP inboxes for `order form` · `auto-renew` · `renewal notice` · `MSA` · `subscription agreement` · `SOW`
- [ ] Capture per contract: **term start, term end, auto-renewal yes/no, notice period in days, purchased seats, annual value, signer, vendor contact.**
- [ ] **Compute the notice deadline as its own column.** Term end minus notice period. This is the date that actually matters.

Misses: month-to-month and click-through agreements, which have no paper at all and appear only in the finance pull.

4 Endpoint and browser signals

Sees free and freemium tools

Endpoint / Security · ½ day

- [ ] Export third-party app access / OAuth grants: Google Workspace → Security → API controls, or Entra → Enterprise apps → user consent.
- [ ] Pull browser extension inventory from MDM or your browser management console.
- [ ] Pull installed-application reports from Intune / Jamf / Kandji.
- [ ] Prioritize grants with **write or admin scopes** — that list serves security review as well as inventory.

⚠ This source is noisy. Filter to apps with more than a handful of users before adding them to the master sheet, or you'll bury the signal.

Misses: nothing much — but it over-reports, which is the opposite problem.

No single source is complete. Every one of the four has a blind spot the others cover — which is why they run in parallel, and why the source column in week 2–3 matters.

WEEK 1–2

Renewal triage — start immediately

A renewal inside 90 days is money leaving the building while you build a spreadsheet. Don't wait for a full inventory.

90 days	Notice	Owner
The only window you work in the first fortnight.	Term end minus notice period — the real deadline.	Unowned renewals auto-renew, every time.

- [ ] Build one list sorted by **next renewal date**, annual value in column two. Work only the next 90 days.
- [ ] For each line, **find the notice deadline first.** Most agreements auto-renew unless you give 30/60/90 days' written notice. For anything renewing in the next 60 days, that deadline may have already passed — check before you plan a negotiation.
- [ ] **Confirm the owner** — the person who will defend the spend this quarter, not whoever signed two years ago.
- [ ] **Ask each vendor for their own usage numbers.** Most account teams will share seat activity on request. For your largest apps this partially backfills lost utilization data. It costs one email.
- [ ] Decide: **renew / renegotiate / kill.** Argue from purchased seats vs. IdP-assigned users, headcount change since last renewal, and owner testimony. Weaker evidence than you had — still enough to hold a renegotiation.
- [ ] If a renewal is un-triageable in time, ask for a **short-term extension at current rate.** Almost always available, and it beats renewing blind for a year.

Send the list to Finance at the end of week one — unfinished, with gaps labeled.

This is the artifact they actually want. A labeled gap is credible; a silent one isn't.

WEEK 2–3

Consolidate and de-duplicate

The step everyone underestimates. Do it deliberately, once.

NORMALIZE ON THE ROOT DOMAIN, NOT THE DISPLAY NAME

`Atlassian` `Jira` `JIRA SOFTWARE-ANNUAL` → `atlassian.com`

Three strings, one key. Keep a single **alias column** so every source's naming collapses into one row and stays auditable.

- [ ] Apply your suite rule consistently — the one you wrote at the top of the sheet on day one.
- [ ] Add a **source column** — which of the four pulls found each app. Apps found in only one source are your least reliable rows.
- [ ] Sanity-check the total against what Finance believes annual software spend to be. A large gap means a missed feed, not a missed app.

RECONCILE THE OBVIOUS CONFLICTS

APPEARS IN	MISSING FROM	MOST LIKELY EXPLANATION
Finance	IdP	Shadow IT, or SSO not enforced
IdP	Finance	Free tier, or someone else's budget
Contracts	Everywhere else	Possibly already cancelled

~90%

Target coverage. All four sources combined should land you around 90% of real apps and most of real spend. Write your actual coverage estimate in the doc.

WEEK 3–4

Start the new engagement baseline

Your usage history is gone. The new clock starts the day you instrument — so do this in week one if you can, and week three at the latest.

- [ ] **Extend and export IdP sign-in log retention.** Non-negotiable, and the cheapest thing on this list.
- [ ] **Connect your top 10 apps by spend directly via API** for last-active dates, license tiers, and seat assignments. Those ten usually carry most of your negotiating leverage.
- [ ] **Turn on SCIM** where available, so provisioning and deprovisioning generate a record instead of a ticket.
- [ ] Keep OAuth and endpoint telemetry **flowing continuously**, not as a one-time pull.
- [ ] Set a recurring monthly check for **newly appeared vendors** in the card and AP feeds.
- [ ] Put a standing quarterly export of your *new* system of record somewhere you own. Whatever you adopt next, don't repeat the mistake this checklist exists because of.

WHAT THE CLOCK GIVES YOU BACK

BY MID-NOVEMBER

90 days of real utilization data

BY NEXT SUMMER

A full renewal cycle's worth

ONGOING

Three questions for every future SaaS contract

Ask while you're a happy customer, not while you're leaving.

1. Is there a **documented, self-serve export of all my objects** — inventory, spend, contracts, usage history — not a CSV of the current view?
2. Is **continued data availability for a defined window after termination** a contractual commitment, or a support-ticket favor?
3. Can I pull all of it **via API on a schedule I control**?

Then actually run that export quarterly and keep the file. That habit, not vendor selection, is what makes a shutdown survivable.