ATLAS
ASSET & TECHNOLOGY LANDSCAPE AUDIT SOLUTIONS

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ATLAS · QUARTERLY REPORT

Quarterly Renewal & Spend Report

SaaS spend, access and renewals — kept current by Renewal Guardian, priced against the original review.

PREPARED FOR	**Harborline Consulting Group (Sample)**
PERIOD	**April 1 – September 30, 2026**
REFERENCE	**ATLAS-SR-0000 (Sample)**
ISSUED	**October 2026**

> "The review finds the money once. The retainer makes sure you actually capture it every year."

RENEWAL RADAR · NOTICE FILING · QUARTERLY RIGHTSIZING · CFO REPORTING

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FICTIONAL DATA NOTICE (FOR PROSPECT EVALUATION ONLY)

Illustrative Dataset Only: Every company name (Harborline Consulting Group), product name, pseudonymous user ID (U-xxxx), contract date, and dollar figure in this report is invented for illustration. It demonstrates the analytical depth, multi-scenario caution, and evidence-referenced structure of an ATLAS SaaS Spend & Access Review. It does not describe any real customer.

01 Engagement Overview & Executive Scorecard

Engagement Attribute	Detail (Fictional Illustration)
Prepared For	Harborline Consulting Group, approx. 145 employees (Technology & Management Consulting)
Prepared By	ATLAS (Asset and Technology Landscape Audit Solutions LLC) — atla-solutions.com
Review Period Covered	Customer-provided exports covering April 1, 2026 – September 30, 2026 (6-month window)
Vendors in Scope	10 major SaaS subscriptions selected at kickoff ($184,200 combined annual cost)
Validation Call Held	October 14, 2026 with IT Director & Procurement Lead (9 shared/service accounts whitelisted)
Report Status	Final Sample Deliverable (Illustrating Standard 10-Vendor Engagement)

REVIEWED ANNUAL SPEND
$184,200 / yr
538 paid seats + 2 flat-fee contracts

GROSS OPPORTUNITY
Up to $46,908
25.5% ceiling before contract checks

CONSERVATIVE ESTIMATE
Up to $33,636
18.3% after buffer seats & floors

OFFBOARDING EXCEPTIONS
8 Active Seats
Tied to 5 departed IDs (2 post-exit logins)

02 Executive Summary & Two-Scenario Opportunity Model

Harborline asked where it may be paying for software capacity or license tiers it does not need ahead of Q4 and Q1 renewals, and which ownership or post-offboarding access items require internal investigation. ATLAS reviewed ten subscriptions with a combined annual cost of $184,200, using only the CSV/Excel exports and redacted order-form pricing pages Harborline chose to share.

We identified seven prioritized findings: four commercial spend opportunities (Findings 1–4) and three governance and access findings (Findings 5–7). Because apparent seat discrepancies in admin exports are subject to contract minimums, volume-discount tiers, and onboarding buffer needs, ATLAS presents two financial estimates rather than asserting a single guaranteed savings number:

#	Spend Optimization Lever	Conservative Estimate (/Yr)	Gross Ceiling (/Yr)	Key Assumptions & Verification Needed
F1	Inactive (>90d), Pending & Unassigned Seats (4 Vendors)	Up to $20,220	Up to $24,300	Gross = 11 CRMPro ($10,560) + 24 CollabSuite ($5,760) + 9 DesignPro ($4,860) + 13 ChartBoard ($3,120) = $24,300. Conservative keeps 9 CollabSuite & 2 CRMPro buffer seats (−$2,160 − $1,920) = $20,220; requires checking CRMPro 50-seat volume floor.

#	Spend Optimization Lever	Conservative Estimate (/Yr)	Gross Ceiling (/Yr)	Key Assumptions & Verification Needed
F2	License Tier Right-Sizing (CRMPro & DesignPro)	Up to $7,440	Up to $8,520	Converts 8 read-only CRMPro users ($80 -> $25/mo = $5,280/yr) and 6 view-only DesignPro users ($45 -> $15/mo = $2,160/yr Conservative; -> $0/mo Viewer = $3,240/yr Gross): $5,280 + $2,160 = $7,440; $5,280 + $3,240 = $8,520.
F3	Possible Overlap: VidMeet vs. CollabSuite Video	Up to $3,840	Up to $11,520	Conservative retains 40 VidMeet seats for external client webinars; Gross assumes full replacement by CollabSuite.
F4	Split Monthly Card Billing on TaskTrack (10 Seats)	Up to $2,136	Up to $2,568	Merges 10 monthly card seats ($25 -> $18/mo = $840/yr) and removes 6 inactive seats (Conservative) to 8 (Gross) across both plans at $18/mo ($1,296–$1,728/yr): $840 + $1,296 = $2,136; $840 + $1,728 = $2,568.
—	**TOTAL ESTIMATED ANNUAL OPPORTUNITY**	**Up to $33,636 / yr**	**Up to $46,908 / yr**	*Subject to contract verification gates; Finding 7 seat cost ($2,856) is already counted inside Findings 1 and 4 — it is never added to the totals.*

Most Important Next Steps (Next 30 Days)

- **Beat the November Notice Deadlines:** Confirm contract minimums and submit written modification notices for DesignPro (Hard Notice Deadline: November 15, 2026) and CRMPro (Hard Notice Deadline: November 16, 2026) before their auto-renewal windows close (Findings 1, 2, and 5).
- **Validate & Revoke Departed-Employee Accounts:** Have IT match the 5 departed employee IDs (U-0019, U-0044, U-0082, U-0115, U-0138) against Harborline's internal key, review the 8 active accounts, and check login logs for the 2 IDs showing post-departure activity (Finding 7).
- **Assign Owners to Unowned Subscriptions:** Name a clear business owner for SignFlow (renews Nov 30), TaskTrack (renews Dec 20), and NoteVault, and consolidate the separate monthly card billing for TaskTrack (Findings 4 and 6).

03 What Was Reviewed—and What Was Not

Source ID	Record Reviewed (Fictional)	Provided By	Period Covered	Format & Notes
A1 & A2	Subscription List & Seat Summaries (10 Vendors)	Finance & IT	Current at Oct 1, 2026	Excel (.xlsx)
A3 & A7	User Activity Exports (8 Seat-Based Vendors)	IT Admin	Apr 1 – Sep 30, 2026	CSV, pseudonymous IDs (U-0001 to U-0172)
A4	Order-Form Pricing & Renewal Pages (8 Vendors)	Procurement	Current contract terms	Redacted PDF (NoteVault & SignFlow N/A)
A5	12-Month AP & Corporate Card Spend Export	Finance / AP	Oct 2025 – Sep 2026	CSV (Vendor, Date, Amount)
A6	Departure List (21 Pseudonymous IDs)	HR via IT	Apr 1 – Sep 30, 2026	CSV (ID and Departure Date only; no names)
A9	Active Definition & IT Validation Notes	IT Director	Confirmed Oct 14, 2026	Active = >=1 login in 90d; 9 service accounts excluded

WHAT WAS NOT REVIEWED (SCOPE BOUNDARIES)

- Any subscription, cloud service, or AI tool not in the 10 selected vendors or the provided AP spend summary. This is not a complete discovery of all software in use.
- Order-form PDFs for NoteVault and SignFlow were unavailable; their notice windows are listed as 'Unconfirmed (Assumed 30d)' for Procurement to check.
- Security controls, compliance posture, or legal contract terms. ATLAS did not access live systems and made no changes to any account or subscription.

04 Master 10-Vendor Subscription & Renewal Notice Register

SaaS agreements commonly require written notice 30 to 60 days BEFORE the renewal date to reduce seats or cancel. The table below calculates each contract's Hard Notice Deadline:

Product	Plan / Tier	Paid Seats	Active (90d)*	Unit Cost	Annual Cost	Renewal Date	Notice Window	Hard Notice Deadline	Business Owner
CRMPro	Enterprise	50	39	$80/mo	$48,000	Jan 15, 2027	60 Days	**Nov 16, 2026 !**	VP Sales
CollabSuite	Business Plus	160	136	$20/mo	$38,400	Feb 01, 2027	30 Days	Jan 02, 2027	IT Director
DevTrack	Standard	75	69	$22/mo	$19,800	May 01, 2027	30 Days	Apr 01, 2027	VP Engineering
DesignPro	Full Team	28	19	$45/mo	$15,120	Dec 15, 2026	30 Days	**Nov 15, 2026 !**	Marketing Lead
DataSync	Platform Flat	Flat	n/a	Flat Fee	$14,000	Aug 01, 2027	60 Days	Jun 02, 2027	VP Engineering
ChartBoard	Creator Pro	55	42	$20/mo	$13,200	Apr 01, 2027	30 Days	Mar 02, 2027	Delivery Lead
VidMeet	Pro Meetings	60	54	$16/mo	$11,520	Feb 15, 2027	30 Days	Jan 16, 2027	Operations
TaskTrack**	Annual + Card	45	33	$18/$25	$9,000	Dec 20, 2026	30 Days	**Nov 20, 2026 !**	**None Identified**
NoteVault	Team	65	52	$10/mo	$7,800	Mar 15, 2027	Unconf.	~Feb 13, 2027	**None Identified**
SignFlow	Corporate Flat	Flat	n/a	Flat Fee	$7,360	Nov 30, 2026	Unconf.	**~Oct 31, 2026 !**	**None Identified**
TOTAL (10)	**8 Seat + 2 Flat**	**538**	**444**	—	**$184,200**	—	—	**4 Within 45d**	**3 Unowned**

**Active (90d) = at least one recorded login in the 90 days before the Sep 30 export (excluding 9 whitelisted shared/service accounts). **TaskTrack includes 35 annual seats ($18/mo = $7,560) plus 10 monthly department-card seats ($25/mo = $3,000 annualized; pro-rated $9,000 in review window).*

05 Seat Utilization & Inactivity Cohort Breakdown

To prevent disrupting employees who only use a tool monthly or quarterly, ATLAS segmented all 538 paid seats across the 8 seat-based vendors by last-activity window, pending invitations, and unassigned pool capacity:

Product	Paid Seats	Active (0–30d)	Moderate (31–60d)	Low Use (61–90d)	Inactive (>90d)	Pending Invites	Unassigned Pool	Gross Unused Seats
CRMPro ($80/mo)	50	31	5	3	6	2	3	11 seats ($10,560/yr)
CollabSuite ($20/mo)	160	128	5	3	12	3	9	24 seats ($5,760/yr)
DevTrack ($22/mo)	75	64	3	2	3	0	3	6 seats (Buffer kept)
DesignPro ($45/mo)	28	14	3	2	6	1	2	9 seats ($4,860/yr)*
ChartBoard ($20/mo)	55	30	7	5	8	2	3	13 seats ($3,120/yr)*
VidMeet ($16/mo)	60	48	4	2	4	0	2	See Overlap (F3)
TaskTrack ($18/$25)	45	27	4	2	8	1	3	12 seats (See F4)
NoteVault ($10/mo)	65	41	7	4	9	0	4	13 seats ($1,560/yr)
TOTAL SEATS	**538**	**383 (71.2%)**	38 (7.1%)	23 (4.3%)	**56 (10.4%)**	**9 (1.7%)**	**29 (5.4%)**	**94 Unused (17.5%)**

06 Offboarding-Related Access Exceptions (For IT Validation)

Matching Harborline's departure list (21 pseudonymous IDs from April 1 to September 30) against the 8 vendor user exports identified 8 accounts belonging to 5 departed IDs that still show as 'Active':

Pseudonymous ID	Departure Date	Vendor Exports Showing Active Seat	Last Recorded Login Date	Linked Annual Seat Cost	Recommended IT Validation Action
U-0019	May 15, 2026	CRMPro ($960), CollabSuite ($240)	May 14, 2026 (Prior to exit)	$1,200 / yr	Confirm departure & deactivate both seats
U-0044	Jun 30, 2026	DesignPro ($540), TaskTrack ($216)	**Jul 06, 2026 (+6d AFTER exit)**	$756 / yr	Verify whether manager or ex-user logged in; revoke
U-0082	Jul 15, 2026	CollabSuite ($240), NoteVault ($120)	Jul 12, 2026 (Prior to exit)	$360 / yr	Deactivate seats and reclaim licenses
U-0115	Aug 28, 2026	ChartBoard ($240)	Aug 20, 2026 (Prior to exit)	$240 / yr	Deactivate seat in ChartBoard admin portal
U-0138	Sep 10, 2026	TaskTrack (Card Workspace — $300)	**Sep 14, 2026 (+4d AFTER exit)**	$300 / yr	Check card workspace access & revoke session

07 Findings Summary & Detailed Finding Cards

FINDING 1 | Inactive (>90d), Pending & Unassigned Seats — CRMPro, CollabSuite, DesignPro & ChartBoard

HIGH PRIORITY · NOV 15–16 CLIFFS

Conservative Opportunity: **Up to $20,220 / yr** | **Gross Opportunity:** **Up to $24,300 / yr** | **Confidence:** **Medium–High** | **Owner:** **IT & Procurement**

Supporting Evidence: User exports (A3) and seat summaries (A2) show 11 unused seats in CRMPro ($80/mo = $10,560/yr), 24 unused seats in CollabSuite ($20/mo = $5,760/yr), 9 unused seats in DesignPro ($45/mo = $4,860/yr), and 13 unused seats in ChartBoard ($20/mo = $3,120/yr).

How the Figures Are Calculated: Gross: $10,560 + $5,760 + $4,860 + $3,120 = $24,300/yr (all unused seats at full price, matching Section 05). Conservative keeps 2 CRMPro buffer seats (−$1,920) and 9 CollabSuite buffer seats (−$2,160): $24,300 − $4,080 = $20,220/yr.

Why This Is Not Yet a Confirmed Saving (Verification Gates): Before reducing seat counts, Harborline must check (1) whether CRMPro's 50-seat order form enforces a minimum seat count or volume-discount floor, (2) whether any >90d inactive user is on extended leave, and (3) how many unassigned CollabSuite seats IT wants to keep for Q1 onboarding.

Recommended Next Action: Reclaim departed and pending-invite seats immediately; confirm contract minimums and submit written seat-reduction notices before Nov 15 (DesignPro) and Nov 16 (CRMPro).

FINDING 2 | License Tier Over-Provisioning — CRMPro Enterprise & DesignPro Full Seats

MEDIUM–HIGH · NOV 15–16 CLIFFS

Conservative Opportunity: **Up to $7,440 / yr** | **Gross Opportunity:** **Up to $8,520 / yr** | **Confidence:** **Medium (Role Check)** | **Owner:** **Sales Ops & Marketing**

Supporting Evidence: In CRMPro, 8 active users in Finance and Leadership have a role of 'Dashboard Viewer / Read-Only' with zero record edits in 6 months, yet occupy $80/mo Enterprise seats (Order form lists a $25/mo Light/Reporting tier = $5,280/yr difference). In DesignPro, 6 active Engineering/Delivery users show view-only activity on $45/mo Full seats (Viewer tier is $0/mo; Dev/Light tier is $15/mo = $2,160–$3,240/yr difference).

How the Figures Are Calculated: Conservative (Dev/Light tier for DesignPro): $5,280 + $2,160 = $7,440/yr. Gross (Viewer tier for DesignPro): $5,280 + $3,240 = $8,520/yr. These 14 users are active employees — a different set from Finding 1's unused seats — so no figure is double counted.

Verification Gates: Confirm with Sales Ops and Marketing whether those 14 users require edit/creation permissions for upcoming projects and whether CRMPro allows mixing Enterprise and Light tiers on the same order form.

Recommended Next Action: Confirm role requirements with department leads and request mixed-tier renewal quotes prior to the Nov 15 and Nov 16 notice deadlines.

FINDING 3 | Possible Functional Overlap — VidMeet ($11,520/yr) vs. CollabSuite Video Meetings

EVALUATE PRIOR TO JAN 16 CLIFF

Conservative Opportunity: **Up to $3,840 / yr** | **Gross Opportunity:** **Up to $11,520 / yr** | **Confidence:** **Low–Medium** | **Owner:** **Operations & IT**

Supporting Evidence: Harborline pays for 60 VidMeet Pro seats ($16/mo = $11,520/yr; 54 active), while all 160 employees already have CollabSuite Business Plus, which includes built-in HD video conferencing and recording.

Caveats & Verification Gates: ATLAS has not tested whether CollabSuite Meetings satisfies all client-facing webinar, external guest, or recording workflows. Overlap is an indicator to evaluate internally—not an automatic recommendation to cancel all VidMeet seats. Retaining 40 seats for client-facing consultants and removing 20 internal-only seats yields up to $3,840/yr.

Recommended Next Action: Compare required meeting features and survey client-facing teams in November/December ahead of VidMeet's January 16, 2027 notice deadline.

FINDING 4 | Split Monthly Card Billing on TaskTrack + Three Unowned Subscriptions (Findings 4 & 6)

HIGH CONFIDENCE · GOVERNANCE

TaskTrack Opportunity: **Up to $2,136–$2,568 / yr** | **Unowned Spend (F6):** **$24,160 / yr across 3 tools** | **Confidence:** **High (AP & Contract)** | **Owner:** **Finance & Dept Heads**

Supporting Evidence: Cross-checking the Subscription List (A1: 35 annual TaskTrack seats @ $18/mo) against the 12-Month AP/Card Spend Export (A5) revealed a separate $250/mo corporate card charge for 10 monthly TaskTrack seats at $25/seat/mo. In addition, TaskTrack ($9,000), NoteVault ($7,800), and SignFlow ($7,360) had no business owner listed on Harborline's tracker.

How the Figures Are Calculated: Merging the 10 card seats into the annual plan saves 10 × ($25 − $18) × 12 = $840/yr. Removing 6 inactive seats (Conservative) to 8 (Gross) across both plans at the post-merge $18/mo rate saves $1,296 to $1,728/yr. Conservative total: $840 + $1,296 = $2,136/yr; Gross total: $840 + $1,728 = $2,568/yr.

Verification Gates: Confirm whether the 10-seat monthly TaskTrack workspace can be merged into the master annual account without losing project history, and designate an executive owner for SignFlow before its ~Oct 31 notice window.

Recommended Next Action: Assign owners to all three tools within 15 days; merge the monthly TaskTrack card plan into the annual contract before the Nov 20 notice deadline.

08 30 / 60 / 90-Day Action Plan (Timed to Renewal Deadlines)

Window	Action Item	Finding Ref.	Recommended Owner	Target Date
By Day 7	Match the 5 departed IDs (U-0019, U-0044, U-0082, U-0115, U-0138) using internal key; review the 8 active accounts and check U-0044 / U-0138 post-exit login logs.	Finding 7	IT Director	Within 7 Days
By Day 15	Name business owners for SignFlow, TaskTrack, and NoteVault; verify SignFlow renewal terms ahead of its November 30 renewal.	Finding 6	Finance / Dept Heads	Oct 30, 2026

Window	Action Item	Finding Ref.	Recommended Owner	Target Date
By Day 25	Confirm DesignPro minimums and role needs; submit notice to remove inactive seats and downgrade view-only seats before Nov 15 notice deadline.	Findings 1, 2, 5	Marketing / Procurement	Nov 12, 2026
By Day 25	Confirm CRMPro 50-seat discount floor and Light-tier eligibility; submit written modification notice before Nov 16 notice deadline.	Findings 1, 2, 5	VP Sales / Procurement	Nov 13, 2026
By Day 30	Consolidate the 10-seat monthly TaskTrack card subscription into the annual agreement and adjust renewal seat count before Nov 20 cliff.	Finding 4	Finance / IT	Nov 18, 2026
By Day 60	Test CollabSuite video meetings against VidMeet requirements with Operations; decide on full or partial seat reduction before Jan 16 cliff.	Finding 3	Operations / IT	Dec 20, 2026
By Day 90	Add non-SSO SaaS tools (DesignPro, TaskTrack, ChartBoard, NoteVault) to the HR/IT offboarding checklist; set 60-day calendar alerts for all renewals.	Findings 5, 7	IT / HR / Finance	Jan 15, 2027

09 Method, Confidence Levels, and Limitations

Confidence Rating	Meaning & Evidence Standard
High	Directly supported by cross-checked customer records (such as order form + AP spend export + user list) with minimal interpretation needed.
Medium	Supported by the records provided, but financial realization or risk impact depends on assumptions or contract/technical validation by the customer.
Low	An indicator of possible overlap or inefficiency that suggests a closer internal look; not enough evidence to act on alone.

- Findings rely strictly on the point-in-time records provided by the customer. ATLAS did not access live systems and made no changes to any account or subscription.
- Estimated figures are gross and conservative annual opportunities using the prices stated in the provided records. They are not guaranteed or realized savings.
- This review does not cover all software in use, security posture, or compliance certification, and is not legal, tax, or financial advice.
- Customer records were handled under the signed engagement agreement in an isolated encrypted workspace, never submitted to consumer AI services, and permanently deleted within 14 days of final report delivery.