

Savings & Ownership Snapshot

Sample excerpt — Managed Renewal Cleanup Sprint

OWNER ACCOUNTABILITY

TOOL / VENDOR	ASSIGNED OWNER	ROLE	STATUS
HubSpot	Revenue Lead	Revenue	Confirmed
Pipedrive	— unassigned —	Unknown	Unassigned
Monday.com	Creative Director	Creative	Weak
Dropbox	— unassigned —	Unknown	Unassigned
Loom	Ops Lead	Operations	Weak

SAVINGS QUEUE

TOOL / VENDOR	ISSUE	RECOMMENDED ACTION	MONTHLY	PRIORITY
Pipedrive	Duplicate CRM	Cancel — migrate to HubSpot	\$79 \$948/yr	Act Now
Dropbox	Redundant storage	Consolidate into Google Drive	\$145 \$1,740/yr	Act Now
DocuSign	Low utilization	Downgrade to lighter plan	\$63 \$756/yr	Act Now
Monday.com	Overlap / underuse	Downgrade after team review	\$90 \$1,080/yr	This Month
Loom	Excess seats	Remove unused seats pre-renewal	\$30 \$360/yr	Before Renewal

ESTIMATED MONTHLY SAVINGS IF ACTIONED
Full sprint deliverable includes full action log

\$377-\$480 / mo
\$4,500-\$5,760 annually

Preview only – full sprint includes owner map, renewal tracker, and handled items log.

REDACTED
SAMPLE