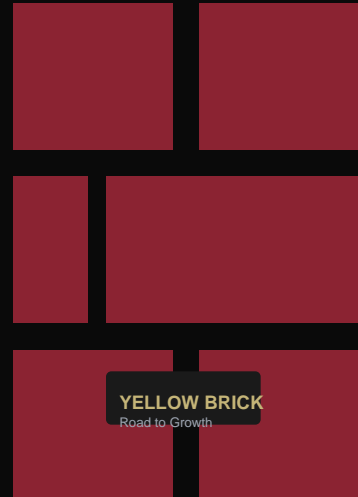


# 2026

# Software Expense Assessment



**AUDIT | CUT | REPLACE**

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## What you get:

- A diagnostic that finds every dollar wasted on software you underuse.
- A framework to audit, consolidate, and replace overpriced tools.
- A path from bloated SaaS spend to purpose-built systems you own.

# TL;DR

***Software expense diagnostic:  
The questions that find where your tools  
cost more than they deliver.***

## **USAGE vs. SPEND**

- What percentage of your software licenses are actively used each month?
- Are you paying enterprise pricing for features nobody touches?

## **OVERLAP & REDUNDANCY**

- How many tools in your stack do the same job?
- Could three tools be replaced by one purpose-built system?

## **TOTAL COST OF OWNERSHIP**

- What do you spend on consultants to configure tools that should work alone?
- What is the hidden cost of training, maintenance, and integration per tool?

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***If you canceled half your subscriptions tomorrow,  
which ones would your team actually miss?***

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# You are overpaying for software your team barely uses.

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The average mid-market company spends \$50K to \$500K per year on SaaS. Most of those tools are used at 20-40% capacity. The rest is waste hidden inside auto-renewed contracts nobody audits.

I have seen this pattern across 20 years of operating inside PE-backed portfolios and enterprise orgs. The CRM has 200 fields and sales uses 12. The marketing stack has four tools that do the same job. The analytics platform costs \$80K/year and three people use it.

This diagnostic asks the uncomfortable questions. Not "do you have tools?" but "are those tools earning back what you pay for them?"

Answer each section honestly. Score yourself. The waste will be obvious.

Yellow Brick replaces what the diagnostic flags. We audit, spec the replacement, build purpose-built systems, migrate your data, and support what we deliver. You own everything. No recurring vendor lock-in.

If you already know your software spend is out of control: book 15 minutes. I will tell you whether it is replaceable and what it would cost.

## Ravi Karwal

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# 02

## The Software Waste Problem

(Context)

### The math most companies ignore

- What is your total annual SaaS spend across all departments?
- What percentage of licensed seats are active (logged in within 30 days)?
- How many tools were auto-renewed without a usage review?
- What do you spend on consultants to configure tools?

### The compounding problem

- Are monthly SaaS fees growing faster than your revenue?
- How many tools require a dedicated admin to maintain?
- What switching cost keeps you on a tool you would otherwise cancel?

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#### ACTIONABLE QUESTION

***Add up every SaaS invoice from the last 12 months. That number will be higher than you expect.***

# 03

## CRM & Sales Tools

(High Priority)

### CRM usage audit

- What percentage of CRM fields does your sales team use?
- Is pipeline data accurate enough to forecast within 10%?
- How long until a new rep is productive in your CRM?
- Are you paying for AI features nobody has configured?

### Sales tool stack

- How many tools does a rep touch in a single deal cycle?
- Do you have separate tools for prospecting, engagement, proposals, contracts?
- What is the overlap between CRM, sales engagement, and marketing automation?

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#### ACTIONABLE QUESTION

*If your CRM disappeared, could the team rebuild pipeline from memory? If yes, the CRM is failing.*

# 04

## Marketing & Automation

(High Priority)

### Marketing platform audit

- How many marketing tools are you paying for? List them.
- Which ones have overlapping functionality?
- What is your cost per lead by channel?

### Automation effectiveness

- Are automation workflows producing pipeline or just activity?
- How many email sequences are running unreviewed for 6+ months?
- What percentage of marketing leads convert to sales-qualified?

### Content and distribution

- How many hours/week does your team spend producing content manually?
- Are you paying for CMS, email, social scheduler, and analytics separately?
- What is your cost per content asset?

# 05

## Operations & Productivity

(Medium Priority)

### Productivity tool audit

- How many PM, communication, and document tools does your team use?
- Are people switching between 5+ apps to complete one workflow?
- What is the monthly cost per employee for productivity software?

### Process automation

- Which manual processes consume the most hours per week?
- Have you evaluated whether those could be automated?
- Are you paying for enterprise platforms when a targeted build costs less?

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#### ACTIONABLE QUESTION

*Ask your team: what repetitive task do you wish would disappear? That is your first target.*

# 06

## Analytics & Reporting

(Medium Priority)

### Analytics platform audit

- How much do you spend annually on analytics and BI tools?
- How many people actively log in to your analytics platform?
- Are you paying for real-time dashboards nobody checks in real time?

### Reporting efficiency

- How many hours/week does someone spend building reports manually?
- Do your reports answer the questions leadership actually asks?
- Could a simpler, cheaper tool meet your needs?

# 07

## Customer Success Tools

(Medium Priority)

### CS platform audit

- What tools are you using for onboarding, support, and retention?
- Are health scores automated or manually updated?
- What is the cost per customer of your CS tooling?

### Feedback and retention

- Are you collecting feedback systematically or ad hoc?
- Can you predict churn before it happens with current tools?
- Are CS tools integrated with CRM and billing?

# 08

## Integration & Data Flow

(High Priority)

### System connectivity

- How many tools are connected via native integrations vs. manual entry?
- Are you paying for middleware to connect tools that should talk natively?
- How often does data get stuck between systems?

### Data consistency

- Is customer data consistent across all platforms?
- How many sources of truth exist for revenue data?
- When a record changes, how many systems need manual updates?

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#### ACTIONABLE QUESTION

*Draw how data flows between your tools. Every manual step is a failure point and a cost.*

# The Replacement Framework

## How Yellow Brick replaces what the diagnostic flags

### Phase 1: Audit

Map every tool, its cost, usage, and overlap. Flag what costs more than it delivers. Deliverable: Current State Assessment with replacement candidates ranked by ROI.

### Phase 2: Spec

Define requirements for each replacement. Compliance, success criteria, migration path. Deliverable: Signed PRD with testable acceptance criteria.

### Phase 3: Build and validate

Build the replacement. Run it parallel to the old tool. Validate against criteria. Deliverable: Validated system with audit trail.

### Phase 4: Migrate

Move data, retrain users, cut over. Gradual, tested, reversible. Deliverable: Full migration with rollback capability.

### Phase 5: Support

90 days post-launch. Documentation, training, bug fixes. Deliverable: Documented system. You own it.

**Timeline: 6-16 weeks**

**Pricing: Milestone payments. You pay when deliverables land.**

**Ownership: You own everything. No recurring fees. No lock-in.**

# 10

## 10 Actions with Yellow Brick

### Specific things we do to cut your software spend

#### **Full SaaS audit**

Catalog every tool, annual cost, active users, utilization. Identify overlap and overpricing.

#### **Vendor contract review**

Review renewal terms and cancellation windows. Flag overpriced unused capacity.

#### **Consolidation roadmap**

Map which tools can be replaced by fewer systems. Prioritize by savings.

#### **CRM replacement or optimization**

Optimize or replace bloated CRMs that match your actual sales process.

#### **Marketing stack consolidation**

Replace overlapping tools with a unified system you own.

#### **Custom automation builds**

Replace expensive platforms with targeted automations that do exactly what you need.

#### **Data migration**

Move data cleanly. Validated, tested, with rollback capability.

#### **Integration architecture**

Connect remaining tools so data flows without manual entry.

#### **Team training and documentation**

Train on new systems. Document everything so you own it.

#### **Quarterly review cadence**

Recurring audit to prevent waste from accumulating again.

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### **Book 15 minutes. No deck. No pitch. The numbers.**

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