

SOFTWARE VALUE / FILLABLE WORKBOOK

Software Stack Inventory and Rationalisation Workbook

See what your business pays for, depends on and should retain, review, retire or investigate further.

01 Start with the tools used most weeks

List each service and its practical job. Complete a service record on page 2, make one evidence-led decision on page 3 and record the next action on page 4. You do not need to resolve the whole stack at once.

Fill the shaded fields in a PDF reader that supports forms, or print and write. Save a copy, close it and reopen it to check your entries. Keep answers brief; use a separate sheet for more detail. Do not enter passwords or other secrets.

Team or business area

Prepared by

Review date - DD/MM/YYYY

Service to examine first

Service 1

Recurring job it supports

Accountable owner

Service 2

Recurring job it supports

Accountable owner

Service 3

Recurring job it supports

Accountable owner

Use one service per row and write Unknown where needed. Continue on a separate sheet. This is a working inventory, not a vendor recommendation or an instruction to cancel, migrate or expose data.

SOFTWARE VALUE / REPEATABLE SERVICE RECORD

Record one service

Copy this record for each service. Use evidence or an explicit unknown for each answer.

02 Understand the service

Software or service**Business purpose - what recurring work does it support?****Owner and users - who uses it, and how consistently?****Cost or renewal**

Record a confirmed amount and billing period, an unknown to check, or the next renewal date. Include currency and source where known; no card details.

Dependencies and criticality

What data, integrations, workflows or people depend on it? What if it were unavailable for a day?

Overlap with another authorised tool

Can it do the same job well enough? What practical difference still matters?

Working decision

☐ Retain ☐ Review ☐ Retire ☐ Investigate further

SOFTWARE VALUE / DECISION WORKSHEET

Make a supported decision

Choose the smallest supported decision. A review can end with a question to investigate.

03 Use a working status

Retain	A clear current purpose, accountable owner and known dependency.
Review	Useful, but adoption, cost, scope or ownership needs attention.
Retire	Only after checking data, contracts, integrations and a safe replacement or exit path.
Investigate further	The evidence is not yet sufficient to choose or carry out a change.

04 Name the evidence needed

Priority software or service

What decision is needed, and what supports it?

Minimum evidence before acting - what must be confirmed, by whom and where?

Dependencies and exit checks

For a change, check affected data, contracts, integrations, people and a safe replacement or exit path. Otherwise write No change proposed.

A working status does not authorise cancellation or migration. Continue on page 4.

SOFTWARE VALUE / ACTION AND REVIEW

Follow the decision through

Assign one practical action, then return to the evidence before deciding what happens next.

05 Assign the next action

Software or service and working decision

Next action - what specifically needs checking or doing?

Owner

Review date - DD/MM/YYYY

Unknown or dependency that must be resolved before any change

06 Review the evidence

What was confirmed, where is the evidence and what remains open?

Next decision or action, including its owner

Important: this worksheet is general operational guidance. It does not replace advice about contracts, privacy, security, tax, records or technology specific to your business. Do not cancel, migrate or expose data solely because a workbook entry suggests it.

SOFTWARE VALUE / FICTIONAL WORKED EXAMPLES

Two service reviews

These invented services show the level of evidence to collect. They are not recommendations to use, cancel or replace any product. No savings or business outcomes are implied.

07 Northstar Notes

Purpose and evidence	Shared project notes; six regular users. The owner confirms it is the current team reference.
Dependency and risk	The project board links to these notes. Check the export route before any change. Cost and renewal are not yet confirmed in this example.
Working decision	Retain, with a review action. Confirm the renewal date and export process. A current purpose is evident; missing renewal information creates a question to resolve.

08 Orbit Forms

Purpose and evidence	Two internal forms. Similar capability may exist in an authorised current tool.
Dependency and risk	No customer data is included in this illustration. Verify actual data and integrations before any real action. Cost and renewal remain unknown.
Working decision	Investigate further. Compare the real workflow and migration effort. Check what data is held, where responses go and who relies on them.

Apparent overlap is a question to test; it does not show that another tool can safely replace the service. Unknown costs remain unknown. A workbook entry does not replace the checks or specialist advice described on page 4.