

Know who owns what. Then decide what stays.

Technology vendors rarely operate in neat little boxes. Contracts overlap. Support responsibilities blur. Access survives employee turnover. Renewal dates arrive before anyone has decided whether the service still earns its keep.

AUDIT SCOPE

ORGANIZATION

REVIEWER / TEAM

REVIEW DATE

LOCATIONS IN SCOPE

TECHNOLOGY CATEGORIES IN SCOPE

HOW TO USE THIS WORKSHEET

- 1 Inventory** List every provider, including contracts owned outside IT.
- 2 Verify** Confirm cost, renewal, support, access, and dependencies.
- 3 Diagnose** Identify recurring failures, overlap, unused assets, and gaps.
- 4 Decide** Keep, Coordinate, Consolidate, Replace, or Investigate.
- 5 Act** Assign a priority, owner, due date, and specific next move.

Security note: document the type and scope of administrative or remote access, plus the internal custodian. Never record passwords, recovery codes, API secrets, or encryption keys.

VENDOR RECORD

Provider, contract, cost, support, and access

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VENDOR AND OWNERSHIP

VENDOR / PROVIDER

INTERNAL RELATIONSHIP OWNER

PRIMARY VENDOR CONTACT

EMAIL / PHONE

COVERAGE

SYSTEM, EQUIPMENT, OR SOFTWARE COVERED

LOCATIONS COVERED

CONTRACT AND COST

CONTRACT START

RENEWAL DATE

NOTICE DAYS

REVIEW / CANCEL BY

MONTHLY COST

ANNUAL COST

BILLING / TERM NOTES

SUPPORT AND ACCESS

WHAT SUPPORT IS INCLUDED?

ESCALATION PATH: WHO, HOW, AND EXPECTED RESPONSE

ADMINISTRATIVE OR REMOTE ACCESS: TYPE, SCOPE, VENDOR ROLE, INTERNAL CUSTODIAN

VENDOR RECORD

Dependencies, friction, overlap, and decision

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DEPENDENCIES AND HANDOFFS

WHAT SYSTEMS, VENDORS, CONTRACTS, OR INTEGRATIONS DOES THIS RELATIONSHIP DEPEND ON?

FRICTION AND WASTE

RECURRING SERVICE PROBLEMS, DELAYS, BILLING ISSUES, OR UNRESOLVED TICKETS

OVERLAPPING CAPABILITIES WITH OTHER PROVIDERS OR PLATFORMS

UNUSED EQUIPMENT, LICENSES, LINES, SUPPORT TIERS, OR FEATURES

DECISION AND ACTION

DECISION

PRIORITY

ACTION OWNER

Keep / Coordinate / Consolidate / Replace / Investigate

NEXT ACTION

DUE DATE

EVIDENCE, TRADEOFFS, OR APPROVALS NEEDED

VENDOR PORTFOLIO SUMMARY

Compare the relationships that deserve attention first.



Use one row per vendor. Add actual annual cost when known; otherwise annualize monthly cost. "Priority" should reflect business impact and timing, not merely annoyance.

Vendor	System / Service	Annual Cost	Renewal	Decision	Priority	Next Action

PORTFOLIO TOTALS AND QUICK FINDINGS			
VENDORS REVIEWED	ANNUALIZED SPEND	RENEWALS IN 90 DAYS	HIGH-PRIORITY ACTIONS

FINDINGS AND ACTION PLAN

Turn the audit into decisions with owners and dates.



WHAT THE AUDIT REVEALED

TOP RECURRING SERVICE OR RESPONSIBILITY PROBLEMS

OVERLAP OR CONSOLIDATION OPPORTUNITIES

ACCESS, OWNERSHIP, OR OFFBOARDING RISKS

UNUSED ASSETS OR COSTS TO VERIFY

30 / 60 / 90-DAY ACTION PLAN

NEXT 30 DAYS

DAYS 31-60

DAYS 61-90

Need a second set of eyes?

MCC Solutions can help identify handoff gaps, duplicated capabilities, lifecycle risks, and practical ways to simplify business technology across locations and systems.

REQUEST A TECHNOLOGY CONSULTATION