ENTERPRISE DIAGNOSTIC · SAAS GOVERNANCE

SaaS Governance Checklist

A practical self-assessment for enterprise SaaS visibility, renewals, ownership, and spend control

TELLENNIUM
Enterprise Expense Management

Modern SaaS environments are no longer simple collections of software subscriptions. Across mid-sized and large enterprises, SaaS tools often spread through departments — across vendors, users, contracts, renewals, invoices, add-ons, license tiers, and business-unit ownership. Over time, that creates visibility gaps, duplicate tools, unused licenses, renewal risk, and unclear accountability.

Use this checklist to quickly assess whether your organization has the visibility, governance, and operating discipline needed to manage SaaS subscriptions with control.

HOW TO USE THIS CHECKLIST

YES	PARTIAL	NO
Process in place and working consistently	Exists but inconsistent or incomplete	Missing, manual, or mostly reactive

ASSESSMENT AREAS

#	AREA	ASSESSMENT QUESTION	YES	PARTIAL	NO
01	**SaaS Visibility**	Do you have a centralized view of all SaaS subscriptions, applications, vendors, contracts, users, license counts, costs, and renewal dates across the enterprise?			
02	**Ownership**	Does every SaaS subscription have a clear business owner, technical owner, financial owner, and renewal decision-maker?			
03	**Inventory Accuracy**	Can each SaaS tool be matched to current users, departments, cost centers, contract terms, invoice records, and business purpose?			
04	**Usage Review**	Do you regularly review active users, inactive users, license utilization, feature usage, add-ons, and license tiers to identify waste or misalignment?			
05	**Renewal Management**	Are renewal dates, notice windows, auto-renewal terms, pricing changes, and negotiation deadlines tracked early enough to support informed decisions?			
06	**Contract & Invoice Validation**	Are SaaS invoices reviewed against contracts, license counts, approved pricing, active users, usage data, and expected charges?			
07	**Duplicate Tool Control**	Can your team identify overlapping SaaS tools, duplicate functionality, redundant vendors, and department-level purchases that may be better consolidated?			
08	**Cost Allocation**	Can SaaS costs be accurately allocated or charged back to the right departments, cost centers, teams, users, or business units?			
09	**Governance Workflow**	Is there a repeatable workflow for SaaS requests, approvals, renewals, cancellations, license changes, exceptions, and optimization actions?			
10	**Platform & Expert Support**	Does your team have the platform, process discipline, and subject matter expertise needed to keep SaaS inventory, contracts, invoices, renewals, and vendor issues actively managed?			

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SCORING GUIDANCE

Mostly "Yes"

Your organization has a workable foundation for SaaS governance.

PRIORITY ACTION

Keep your SaaS inventory current, maintain renewal discipline, review usage regularly, and continue improving workflows for ownership, invoice validation, and optimization. Focus on keeping the program proactive instead of letting it become a periodic cleanup effort.

Mostly "Partial"

Important pieces exist, but gaps may still be creating avoidable cost, confusion, or operational risk.

PRIORITY ACTION

Centralize SaaS inventory, contract, invoice, ownership, and renewal data. Then strengthen repeatable workflows for validation, usage review, stakeholder reporting, renewals, and optimization. Pay special attention to areas where ownership is unclear or renewals are managed too late.

Mostly "No"

The current process is likely too reactive and may be exposing the organization to unnecessary spend, missed renewals, duplicate tools, and weak governance.

PRIORITY ACTION

Start with the basics: identify active SaaS subscriptions, assign owners, collect renewal dates, connect invoices to contracts, review usage, and reduce dependence on spreadsheets, vendor portals, and department-by-department tracking.

FIVE WARNING SIGNS YOUR SAAS GOVERNANCE NEEDS ATTENTION

1 No one can quickly explain what SaaS tools are active

If your team cannot quickly see which SaaS subscriptions exist, who owns them, what they cost, who uses them, and when they renew, the organization is managing spend without a reliable foundation.

2 Renewals are discovered too late

When renewal dates appear only after the invoice arrives or the notice window has passed, the organization loses time to review usage, challenge terms, right-size licenses, or negotiate better pricing.

3 Different teams rely on different data

IT, finance, procurement, AP, and business units may each have part of the picture. If those views do not match, teams spend time reconciling data instead of managing the environment.

4 Licenses, add-ons, or tools keep billing after their business need has changed

Inactive users, unused seats, premium tiers, duplicate platforms, and forgotten add-ons can continue billing quietly unless there is a regular usage and ownership review.

5 A platform exists, but action still depends on manual follow-up

Visibility is not enough by itself. If exceptions, disputes, renewals, cancellations, and optimization opportunities are still handled ad hoc through email and spreadsheets, governance is not yet mature.

SUGGESTED NEXT STEP

If this checklist exposes weak spots, the most effective next step is usually a focused review of SaaS visibility, ownership, renewal timing, invoice validation, usage data, vendor overlap, and process accountability.

Start with the areas most likely to create immediate exposure:

- Upcoming renewals
- High-spend SaaS vendors
- Tools with unclear owners
- Underused licenses
- Duplicate applications
- Premium tiers or add-ons
- Invoices that are not being validated
- Subscriptions purchased outside the normal approval process
- Contracts with auto-renewal or notice-window risk

A strong SaaS governance program does not exist to slow the business down. It exists to help the business use the right tools, at the right levels, under the right terms, with clear visibility and accountability.

CLOSING INSIGHT

Organizations typically advance through SaaS governance maturity as inventory discipline improves, workflows become standardized, and ownership accountability becomes clear. Understanding the current state helps leadership identify where operational friction exists and where additional structure is required to achieve sustainable SaaS spend control.

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