ezo assetsonar

SaaS Audit Checklist

Turn strategy into daily execution with these practical steps

Prep & Scope

□ Define audit goals: cost savings, risk reduction, compliance, or all three

□ Decide audit window (last 6–12 months of activity)

□ Identify stakeholders: IT, Finance, Security, key business units

Discover Applications

□ Deploy browser tracking (extension/agent) across users

□ Pull app usage from SSO/IdP logs (Okta, Azure AD, Google Workspace)

□ Export expense data: corporate cards, reimbursements, procurement records

□ Optional: scan devices for installed SaaS-linked software or plugins

Consolidate & Verify

□ Build a master list of discovered apps in a central inventory

□ Assign owners/departments for each app

□ Mark login method (SSO vs. personal email)

□ Note spend, license count, and renewal dates (if available)

Assess Risks & Value

□ Tag apps with a risk level (High / Medium / Low) based on security controls and data sensitivity

□ Flag duplicate/redundant apps performing the same function

□ Compare license count vs. actual usage to spot waste

□ Identify rising/falling usage trends (grassroots favorites vs. shelfware)

Take Action

□ Eliminate or phase out high-risk, low-value apps

□ Consolidate duplicates into one vetted platform

□ Reclaim unused licenses to cut spend

□ Review high-cost apps with low adoption; retrain or renegotiate

□ Decide whether to onboard or retire shadow IT apps that teams rely on

Create & Maintain SaaS Inventory

□ Record app name, category, owner, cost, usage, risk, and renewal dates

□ Use a SaaS Management Platform (e.g., AssetSonar) for automation

□ If manual, set quarterly reminders to update the inventory

Continuous Monitoring

□ Set alerts for new app signups or spend anomalies

□ Share inventory with stakeholders (Finance, Security, Business Owners)

□ Treat this as a loop: Discover → Verify → Rationalize → Monitor. Not a one-time audit