

RECURRING AUDIT * MONTHLY

Monthly Tool Audit Checklist

Run this on the first business day of every month. Tracks: are you actually using what you're paying for, are renewals queued, are seat counts right, and is anyone shadow-using a tool nobody owns. Median savings across 28 retainers in 2025: INR 18,400/mo per agency.

Cost truth-check

1. Pull last month's billing email from each tool - total INR/USD.
2. Cross-reference vs the budget calculator. Variance > 10%? Investigate.
3. Check FX rate used for USD tools - most renewed at the wrong rate at year-start.
4. Confirm GST/VAT line is in your accounting export.

Seat hygiene

1. List active users on each tool. Compare to current team roster.
2. Drop seats for anyone who left or moved roles >30 days ago.
3. Check shared logins - they violate ToS on every tool we tested.
4. Confirm 2FA is on for every admin account.

Usage check

1. Pull last 30-day login count per tool (most tools expose this in admin).
2. Tools with 0 logins by anyone for 60+ days - flag for cancel.
3. Tools with 1 power user only - could you downgrade to a cheaper tier?
4. Tools where the power user is leaving - knowledge transfer NOW.

Vendor change-log

1. Skim each vendor's changelog/roadmap published last 30 days.
2. Flag features added that solve an existing pain (might let you drop another tool).
3. Flag deprecations - does anyone on the team rely on a feature being removed?
4. Note pricing changes - nearly every SaaS raises 10-20% annually quietly.

Renewal calendar

1. List every tool whose annual renewal is in the NEXT 60 days.
2. Email account exec 30 days before renewal asking for that year's discount.
3. Note the current contract terms - mid-cycle cancellation fees, etc.
4. Add the renewal date to your team calendar with 14d + 7d alerts.

AI Overview / GEO coverage

1. Confirm at least one AI-Overview tracking tool is active (Otterly / Peec / AthenaHQ).
2. Pull the citation count delta vs last month for your top 10 pages.
3. Tag any new citations where you appear vs your name was wrong / outdated.
4. Add new high-value queries (where citation might be possible) to the tracker.