

Which business apps do you really need? Audit worksheet

It's easy to lose track of the tools your business uses. Over time, free trials turn into paid subscriptions, project apps outstay their welcome, and you end up paying for things no one really needs.

This simple worksheet has a simple table that will help you take stock, cut costs, and streamline your software, without losing the tools that actually work for your team.

Please note that as all businesses are different, this is designed only as an overview, and not an exhaustive list.



Step-by-step audit checklist

1) List your current apps and who owns them

- Set up a spreadsheet to log each app's name, purpose, cost, number of users, and who owns it – if known.
- If no one currently owns an app, assign someone to take responsibility for tracking use, managing renewals, or flagging when it's no longer needed.
- Ask each team what tools they use – include web-based, cloud-based, and mobile apps.
- Check bank or credit card statements and expense claims for apps downloaded for one-off projects or forgotten subscriptions.
- If time's tight, use Software Asset Management (SAM) tools to automatically scan devices and networks for a real-time, comprehensive picture.

2) Review features, use and overlap

- How often is each app used?
- How many people use it?
- Are there multiple apps doing the same job – file sharing, project management, or team chat?
- Use Google Workspace or Microsoft 365 to check usage of built-in apps.
- Could one tool do the same work? Look for overlap, underuse, and opportunities to simplify.

3) Check the cost and ROI

- What's the monthly (or annual) fee?
- Are there any hidden extras, such as setup, training, support, admin, or ongoing management?
- Is it adding value – saving time, improving workflows, or generating leads or revenue?
- Can someone clearly explain its value to the business?
- Has anyone used it in the last 60 days?

Considerations for your apps

- Has it been used in the last 60 days?
- Is it essential to daily operations or client work?
- Is it still needed for an active project or process?
- Does another app already do the same job?
- Is it worth the monthly cost?
- Can it be replaced with a more cost-effective option?
- Is there a contract or auto-renewal in place?

Quick action template

App inventory table

App	Purpose	Monthly or annual cost	Users	Last used	Licensed type – per user or flat rate	Owner	Value rating (1-5)	Keep / Cancel / Consolidate

4) Setting the policy rules

- Highlight your keepers – the high-value apps your team uses every day.
- Flag low-usage tools and subscriptions that don't provide value.
- Spot apps you're still paying for but no one uses.
- Look for multiple tools doing the same job.
- Compare features, use, and cost.
- Check if a single tool could do the same job faster, better or cheaper.
- Pick the best fit (and lose the rest).

5) Avoid future app overload

- Set up a simple approval process so new apps are reviewed before sign-up.
- Schedule regular reviews – quarterly or twice a year.
- Keep your spreadsheet up to date with every new tool, change, or cancellation.
- Track usage and costs for apps with per-user fees or usage-based pricing.
- Set reminders to review short-term tools before free trials or projects end.
- Build app checks into your onboarding and offboarding process.

A business app audit can save money, cut out unnecessary admin, and give your team a more productive toolkit. And by keeping things under review, you can stop unnecessary apps from creeping back in.

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