

90-Day Pre-Renewal Readiness Checklist

Every control to complete before a major software, SaaS, cloud, or AI renewal enters final negotiation — sequenced across ninety days, with owners and evidence named for each.

10 Waste Signals

Every signal from Executive Brief 001, converted into a check.

Owner Validation

Business owners confirm need before you negotiate, not after.

Negotiation Prep

Leverage, alternatives, and terms established while you still have time.

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Before You Start

This checklist assumes a renewal ninety days out. If yours is closer, work backwards and accept that some leverage is already gone — the negotiation-preparation section still applies.

How to use it

Each item has a **checkbox**, an **owner**, and an implied evidence artefact. "We discussed it" does not close an item; a dated export, a written confirmation, or a signed position does. The owner column uses role names — substitute your own.

Work the phases in order. The sequence matters: analysis before owner validation, owner validation before business case, business case before you talk to the vendor. Reversing any of those hands the vendor your position.

Renewal under review

FIELD	ENTRY
Vendor / publisher	
Agreement or SKU	
Renewal date	
Notice deadline (and days remaining)	
Current annual value	
Seats / units contracted	
Executive sponsor	
Renewal owner	

FIND THE NOTICE DEADLINE FIRST

It is almost always earlier than the renewal date, and missing it converts a negotiation into an auto-renewal. Locate the clause, write the date at the top of this page, and calendar it before working any other item.

02

Phase One — Intake and Normalization

Portfolio Intake

DAYS 1–15

- | | |
|--|------------------|
| ☐ Contract retrieved in full, including all amendments, order forms, and the original master agreement | Sourcing |
| ☐ Notice period and auto-renewal language extracted and diarised | Sourcing / Legal |
| ☐ Audit clause reviewed — scope, notice, cost allocation | ITAM / Legal |
| ☐ Price protection, uplift caps, and reduction rights identified | Sourcing |
| ☐ Current entitlement export obtained from the vendor portal, dated | ITAM |
| ☐ Deployment or assignment data exported from your own systems | ITAM |
| ☐ Usage or activity data pulled for the last 90–180 days | ITAM |
| ☐ Actual spend reconciled against contracted spend, including true-ups | Finance |
| ☐ Business owner and executive sponsor confirmed by name, not by assumption | ITAM |
| ☐ Support tickets and known issues for this product summarised | Service Desk |

Data Normalization

DAYS 16–30

- | | |
|--|-----------|
| ☐ Vendor and product names normalized across procurement, finance, and inventory sources | ITAM |
| ☐ User lists reconciled against HR — leavers, contractors, service accounts identified | ITAM / HR |
| ☐ Duplicate and test accounts flagged and excluded from the baseline | ITAM |
| ☐ Product tiers and editions mapped to the users actually holding them | ITAM |
| ☐ Cost allocated to department, cost centre, and business capability | Finance |
| ☐ Data quality gaps documented — what you could not establish, and why | ITAM |

THE LAST ITEM IS NOT OPTIONAL

Every analysis has gaps. Naming them yourself makes the rest of your numbers credible; having the vendor find them for you does the opposite.

03

Phase Two — Waste Signal Analysis

Waste Signal Analysis

DAYS 31-45

One check per signal from Executive Brief 001. Record the quantified finding beside each — a signal without a number is an opinion.

- ☐ **01 · License utilization below 70%** — inactive accounts, former employees, never-activated seats quantified ITAM
- ☐ **02 · Premium tier creep** — advanced editions assigned to users with no advanced feature activity ITAM
- ☐ **03 · Duplicate applications** — overlapping capability identified across the wider portfolio ITAM / Architecture
- ☐ **04 · Fragmented renewal dates** — related agreements checked for bundling or co-terming leverage Sourcing
- ☐ **05 · Applications without executive ownership** — unowned tools flagged for sunset review ITAM
- ☐ **06 · Inactive integrations and automation** — dormant connectors, retired APIs, excess transaction capacity Integration
- ☐ **07 · Cloud resource growth without governance** — idle compute, unattached storage, always-on non-production Cloud / FinOps
- ☐ **08 · Orphaned software after organizational change** — reorganizations and acquisitions reconciled ITAM
- ☐ **09 · Contract terms that prevent optimization** — minimums, bundles, reduction penalties surfaced Sourcing / Legal
- ☐ **10 · AI licensing without measured value** — AI seats assessed against defined use cases and outcomes ITAM

Quantification

DAYS 31-45

- ☐ **Gross opportunity calculated** — total theoretical reclaim before constraints ITAM
- ☐ **Contractual constraints applied** — minimums, growth bands, term commitments Sourcing
- ☐ **Operational exceptions applied** — seasonal users, pending projects, regulatory retention Business
- ☐ **Actionable savings separated from gross** — the number you will actually defend ITAM / Finance

SEPARATE THE TWO NUMBERS, ALWAYS

Gross opportunity wins the meeting. Actionable savings survives the quarter. Presenting only the first is how ITAM programmes lose credibility with finance permanently — and you only get to do it once.

04

Phase Three — Business Owner Review

Owner Validation

DAYS 46-60

This is the phase most often skipped and the one that determines whether your savings are real. Every reclaim candidate needs a named human to either confirm it or defend it.

- | | |
|---|-----------------|
| ☐ Reclaim candidate list distributed to business owners with a response deadline | ITAM |
| ☐ Exception requests captured in writing , with a stated business reason | Business Owners |
| ☐ Critical workflow dependencies identified — what breaks if this is reduced | Business Owners |
| ☐ Roadmap dependencies checked — planned projects requiring this tool in the next 12 months | Architecture |
| ☐ Security and compliance implications reviewed for any reduction or consolidation | Security |
| ☐ Integration impact assessed — downstream systems depending on this product | Integration |
| ☐ Reduction tolerance agreed per department, in writing | Business Owners |
| ☐ Non-responders escalated to the executive sponsor with a decision deadline | ITAM |
| ☐ Final reclaim position locked and circulated before vendor contact | ITAM |

Alternatives Assessment

DAYS 46-60

- | | |
|---|-----------------|
| ☐ Competitive alternatives identified and roughly costed, including switching cost | Sourcing |
| ☐ Consolidation options modelled — could an existing tool absorb this capability? | Architecture |
| ☐ Do-nothing cost quantified — what renewing unchanged actually costs over the term | Finance |
| ☐ Walk-away position defined and agreed with the executive sponsor | Sourcing / Exec |

A WALK-AWAY POSITION YOU WILL NOT USE IS STILL WORTH HAVING

You rarely execute it. But a negotiator who has genuinely modelled the alternative behaves differently in the room, and vendors can tell.

05

Phase Four — Business Case and Decision

Business Case and Negotiation Strategy

DAYS 61-75

- ☐ **Executive summary drafted** — one page, findings ranked by value and confidence ITAM
- ☐ **Savings register finalised** with gross and actionable columns separated ITAM / Finance
- ☐ **Negotiation position agreed** — target, acceptable, and walk-away outcomes Sourcing / Exec
- ☐ **Term structure modelled** — 1-year versus multi-year, with the flexibility cost priced Finance
- ☐ **Terms to fix identified** — uplift caps, reduction rights, audit clause, notice period Legal / Sourcing
- ☐ **Single point of contact appointed** for all vendor communication Sourcing
- ☐ **Internal message aligned** — everyone who might speak to the vendor is briefed Sourcing

Decision and Governance Handoff

DAYS 76-90

- ☐ **Renewal decision approved** at the appropriate level and documented Executive Sponsor
- ☐ **Reclamation actions executed** before the renewal quantity is locked ITAM
- ☐ **Final quantities and terms confirmed in writing** before signature Sourcing
- ☐ **Notice served** where reducing or terminating — before the deadline, in the required form Sourcing / Legal
- ☐ **New renewal date and notice deadline calendared** for next cycle ITAM
- ☐ **Ongoing governance assigned** — who reviews utilization, and how often ITAM
- ☐ **Lessons captured** — what data was missing, so next cycle starts further along ITAM

CLOSE THE LOOP OR REPEAT THE WORK

The last three items are the difference between a one-time reclamation project and a governance capability. Skip them and you will run this entire checklist again from zero next year.

06

Readiness Score and Next Steps

Count your completed checks. Operational ITAM recommends entering final negotiation only above 75 percent.

PHASE	ITEMS	COMPLETED
Phase One — Intake and Normalization	16	_____ / 16
Phase Two — Waste Signal Analysis	14	_____ / 14
Phase Three — Owner Review and Alternatives	13	_____ / 13
Phase Four — Business Case and Decision	14	_____ / 14
Total	57	_____ / 57

Reading your score

COMPLETION	WHAT IT MEANS
Below 40%	You are not negotiating, you are reacting. Consider a short-term extension rather than committing to a full term on incomplete data.
40–74%	You can hold a credible conversation but not a strong one. Close the Phase Two and Three gaps first — they are where leverage comes from.
75% and above	You have evidence, owner validation, and a defined walk-away. Negotiate.

The three items that matter most

If time is short and you can only complete three things: **find the notice deadline**, **separate gross opportunity from actionable savings**, and **get business owners to confirm reclaim candidates in writing**. Those three carry most of the value in this document.

NEXT STEP

Schedule a No-Cost Executive Briefing

45–60 minutes to apply this checklist to your actual renewal calendar and portfolio. No preparation required. NDA available before any data is shared.

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