

PRACTICAL BUSINESS WORKBOOK | 2026

# Software Stack Inventory & Rationalisation Workbook

A practical two-page worksheet for seeing what your business pays for, depends on and should retain, review or retire.

How to use this workbook  
Start with the tools used most weeks. Record the practical job each one supports, who owns it, what it costs or renews, and where work would break if it disappeared. Do not try to fix the whole stack at once.

## 1 | YOUR INVENTORY

List one service per row. “Cost / renewal” may be a confirmed amount, an unknown amount to investigate, or the next renewal date. “Decision” is a working status, not a vendor recommendation.

| Software / service | Business purpose | Owner + users | Cost / renewal | Dependencies | Decision |
|--------------------|------------------|---------------|----------------|--------------|----------|
|                    |                  |               |                |              |          |
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### Inventory prompts

|                                                      |                                                            |                                                             |
|------------------------------------------------------|------------------------------------------------------------|-------------------------------------------------------------|
| Purpose<br>What recurring work does this support?    | Overlap<br>Does another tool do the same job well enough?  | Criticality<br>What happens if it is unavailable for a day? |
| Adoption<br>Who uses it and is it used consistently? | Integration<br>What data, workflow or people depend on it? | Decision<br>Retain, review, retire or investigate further?  |

2 | RATIONALISE WITH CARE

# Turn the inventory into a practical next decision

The illustration below is fictitious. It shows the level of practical evidence to collect - not a recommendation to use, cancel or replace any product.

| Illustrative service                  | Purpose / evidence                                                                      | Dependency / risk                                                                        | Working decision                                                   |
|---------------------------------------|-----------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------|--------------------------------------------------------------------|
| Northstar Notes<br>Fictitious example | Shared project notes; 6 regular users; owner confirms it is the current team reference. | Links from project board; export route needs checking before any change.                 | <b>RETAIN + REVIEW</b><br>Confirm renewal date and export process. |
| Orbit Forms<br>Fictitious example     | Two internal forms; similar capability may exist in an authorised current tool.         | No customer data in the illustration; verify actual data and integrations before action. | <b>INVESTIGATE</b><br>Compare real workflow and migration effort.  |

Decision worksheet

| Priority software / service | What decision is needed? | Minimum evidence before acting | Owner | Review date |
|-----------------------------|--------------------------|--------------------------------|-------|-------------|
|                             |                          |                                |       |             |
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|-----------------------------------------------------------------------------------|---------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------|
| <b>RETAIN</b><br>A clear current purpose, accountable owner and known dependency. | <b>REVIEW</b><br>Useful but adoption, cost, scope or ownership needs attention. | <b>RETIRE</b><br>Only after checking data, contracts, integrations and a safe replacement or exit path. |
|-----------------------------------------------------------------------------------|---------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------|

Important: this worksheet is general operational guidance. It does not replace advice about contracts, privacy, security, tax, records or technology specific to your business. Do not cancel, migrate or expose data solely because a workbook entry suggests it.