A CASE STUDY

FOR CFOS LOOKING AT SAAS SPRAWL

The SaaS Consolidation Case

How a 110-person Canadian services company discovered 47 SaaS vendors when the CFO had budgeted for 12 - and the consolidation project that recovered low six-figures.

Bolted on. **Built in.**

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CASE 09 · SAAS CONSOLIDATION

A 110-person Canadian energy services operator was carrying **47 active SaaS vendors** with overlapping capability and an overdue cyber audit. Over a 90-day window, Vencer ran a structured consolidation. **The company came out at 14 vendors, with low six-figures recovered in annual spend and a documented cyber posture.**

OPERATOR PROFILE Canadian energy services

110 people across two basins. Mud logging, wireline, and completions support. Two bolt-on acquisitions in the prior 24 months. Active acquirer, growing.

STARTING POSTURE Vendor sprawl and audit gap

$620K annual SaaS spend growing 20% YoY. 47 active vendors. M365 over-licensed by 30 seats. Two EDR products in overlap. No quarterly governance. CFO could not complete the 2026 cyber renewal questionnaire honestly.

ENGAGEMENT IT-and-the-Cycle Review, Bundled · Premier

Scoped at five days. CFO-owned, Vencer-facilitated. **Two days of structured audit plus 88 days of execution.** Each decision had a named internal owner. Vencer drafted the playbook and negotiation frames.

COMPOSITE CASE STUDY

Drawn from multiple actual Vencer engagements with Canadian operators of similar profile. Names, specific identifying details, and precise financials have been anonymized. **The pattern is the point.**

CASE 09 · THE PROBLEM

The CFO called the day the 2026 cyber renewal questionnaire landed. *"I can't answer half of these honestly because I don't actually know what we have."* **A reasonable answer, and a common one.**

Across two bolt-on acquisitions, each acquired company brought its own SaaS stack. Departmental buys never routed through IT. Free trials that migrated to annual commitments. Contract auto-renewals with no annual review. Nobody had counted; nobody was accountable for counting.

The specific signals.

- **Two EDR products in production** on different endpoint groups. Neither team knew about the other's licence.
- **Three separate project-management tools** across the ops, safety, and completions teams. All paid annually. No integrations between them.
- **M365 seat count 30 higher than headcount.** Some accounts belonged to former employees; some to contractors who left in 2024.
- **Zero quarterly governance.** No named vendor owner. No structured renewal calendar. Every renewal was a fire drill or an auto-renew.

> THE UNCOMFORTABLE TRUTH
>
> **You cannot cyber-attest what you do not inventory.** The 2026 questionnaire forced the audit that should have happened 18 months earlier. That is not unusual; it is the pattern.

CASE 09 · THE FINDINGS

Day 2 of the IT-and-the-Cycle Review was the structured audit: two 90-minute sessions each with CFO, IT lead, and operations principals across eight standard SaaS categories. **By end of Day 2, the picture was clear.**

FINDING $204K/year in overlap and unused tooling

Confirmed on Day 2, before any consolidation decision. Duplicate products, expired trial conversions, and contracts renewed by inertia. **Every line item had a specific owner who could confirm the redundancy.**

ADDITIONAL $40K/year from M365 rightsizing

140 M365 seats billed. 110 actively assigned. **30-seat reduction available at next renewal without impacting a single user.**

INDIRECT Reduced cyber-audit surface

Fewer vendors means fewer third-party integrations means fewer attestation gaps. **The consolidation directly moved the operator toward insurance-defensible posture** without adding any cyber tooling.

THE AUDIT METHOD

Eight categories: identity, endpoint, email, backup, project management, ops platforms, finance/HR, and collaboration. Each session named the tools, the owner, the annual cost, and the last time the contract was reviewed. **Categories that had no owner surfaced every unused subscription.**

CASE 09 · THE APPROACH

The framing was deliberate: **this was not a Vencer project.** The CFO ran the steering. Each tool decision had a named internal owner. Vencer drafted the playbook, negotiation talking points, and migration sequencing.

DAYS 1-10 Renegotiate before terminating

Five vendors received a structured “we’re consolidating; reduce 30-40% or we’re moving away” outreach. **Three accepted the reduction** (saving migration friction). Two did not; those got terminated on schedule.

DAYS 11-45 Migrate what needs migrating

Six tools consolidated into three surviving platforms. Each migration had a written cutover plan, a rollback plan, and a named owner. **Zero business disruption reported by end users.**

DAYS 46-90 Governance install

Quarterly vendor-review calendar. Named vendor owners per category. Cyber attestation collected for every surviving vendor with system access. **The habit that prevents the next 47.**

THE CFO'S ROLE

The CFO owned the outcome and ran the steering. Vencer’s strategic advisor facilitated the sessions, drafted the frames, and coached the negotiations. **That division kept the internal accountability where it belonged.**

CASE 09 · THE RESULT

Ninety days from questionnaire arrival to a clean cyber attestation and low six-figures back on the P&L. **The numbers are audited. The stack is documented. The governance is installed.**

SPEND **$620K → $400K annual SaaS**

35% reduction. Low six-figures recovered in 90 days. Plus an additional $40K from M365 licence rationalization at next renewal.

STACK **47 → 14 active SaaS vendors**

70% vendor-count reduction. Every surviving vendor has a named owner, a renewal date on the calendar, and current cyber attestation on file.

POSTURE **Cyber renewal completed with confidence**

CFO could answer the questionnaire honestly and completely. **Renewal came in at 3% below expected uplift with two carriers competing.**

THE MOMENT IT MATTERED

The audit was uncomfortable. Three managers had favourite tools that got cut. The IT director defended decisions in two team meetings. One manager left within 90 days. **The CFO called it “the best difficult decision we made all year.”**

WHAT THIS GENERALIZES TO

The vendor stack audit nobody wants to run surfaces **15-30% of SaaS spend that shouldn’t be there.** Two days of audit, thirty days of execution. The discipline that prevents recurrence takes the remaining 60 days.

ABOUT VENCER GROUP

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Your IT team, wherever your business operates.

We're builders and operators. **Calgary-rooted. Canadian-reaching. Internationally capable.** With multiple engagement models, 24/7 locally staffed NOC/SOC protection, and field-specific support options.

Founded 2006. Nineteen years operating IT for founders, boards, and operators. Zero client breaches in eleven years. Active client work on four continents right now.

Vencer was built from decades of experience across mergers, divestitures, technology transitions, and daily operations. Every scaling moment, every M&A close, every inflection point, encoded into how we build and how we show up.

19	11	4	24/7
YEARS OPTIMIZING IT	YEARS WITHOUT A BREACH	CONTINENTS DELIVERED	SUPPORT AND MONITORING

Let's talk. One conversation. No pitch.

Thirty minutes. Coffee, Zoom, or however works.

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NOTES, METHODOLOGY & LEGAL

How this case study was compiled.

COMPOSITE METHODOLOGY

This case study is a composite drawn from multiple actual Vencer Group engagements with Canadian energy operators of similar profile (80-150 people, active-acquirer stage, IT-and-the-Cycle Review engagement). Names, precise identifying details, and specific financial figures have been anonymized. The pattern of findings and the sequencing of the ninety-day work are drawn faithfully from Vencer's field experience.

FINANCIAL FIGURES AND RANGES

Where the case study cites specific dollar amounts (annual spend before and after, recovered spend, license counts), those reflect representative ranges across the composite engagements. Individual client outcomes have varied within roughly ±25% of the numbers stated here, depending on starting posture, acquisition history, and operational scale.

THE IT-AND-THE-CYCLE REVIEW

The IT-and-the-Cycle Review is a 3-to-5 day structured assessment by a Vencer engineer, covering four dimensions: current spend and whether it's rightsized; vendor stack and integration state; cyber posture and insurance-defensibility; and operational cadence around governance and renewal. It is a scoped engagement, priced per operator size, and delivered under a written statement of work.

ATTRIBUTIONS AND UPDATES

Content reflects Vencer's engagements with Canadian operators through 2026. Insurance renewal outcomes reflect market conditions in Q2 2026 for Canadian mid-market energy operators. Where market conditions change materially, this case study may be updated; consult vencergroup.com/insights for the most current version.

WHERE OUR LAWYERS SMILE

This case study is drawn from a real engagement, anonymized. Company identifiers are changed, financial figures are rounded, and timelines are approximated. Outcomes are specific to the operator described and are not projections for any other engagement. Similar patterns often repeat, but every situation carries its own inputs. Consult your own advisors before drawing operational or investment conclusions from this material.

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