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The SaaS Renewal Negotiation Checklist

The exact pre-renewal sequence we run for clients. Start at 90 days out; never let a contract auto-renew unexamined.

90 days before renewal

- ■ Locate the contract: current price, seat count, term, auto-renewal clause, and the notice period (diarise it).
- ■ Pull utilization: seats paid vs. active users from SSO or the vendor's admin console.
- ■ Interview the business owner: is this tool still critical, nice-to-have, or replaceable?
- ■ Identify at least one credible alternative and its realistic switching cost.
- ■ Check for overlap: does another tool you already pay for cover 80% of this function?

60 days before renewal

- ■ Build your benchmark: list price, typical discount for your size, and what similar companies pay.
- ■ Set three numbers before any call: target price, acceptable price, walk-away position.
- ■ Decide your ask beyond price: seat flexibility, uplift cap, termination-for-convenience clause.
- ■ Signal early: tell your account manager you are reviewing the renewal and evaluating options.

30 days before renewal

- ■ Open the negotiation in writing with your utilization data on the table.
- ■ Reject the first quote. Renewal uplifts (often 7-10%) are almost always negotiable to zero.
- ■ Trade term for price only if you get a discount AND an exit clause; never multi-year at list price.
- ■ If offering to downgrade, name the alternative. A threat without a named option is not credible.
- ■ Get final terms in writing, confirm the auto-renewal clause is amended or removed.

Rules of thumb

- ■ Vendors discount hardest at their quarter-end and financial year-end. Time your close.
- ■ Your leverage peaks early and dies at T-7 days. Late negotiation is a price-taker's position.
- ■ Every 10 minutes of preparation typically returns an hour of negotiation advantage.
- ■ The cheapest licence is the one you stop paying for: always ask 'do we need this at all?' first.

Prefer someone to run this for you? Fivefold AI's Spend Intelligence service handles every renewal on your calendar, backed by a 90-day savings guarantee. **5foldstrategy.com**