SERVICES / CLIENT REVIEW / FICTIONAL SAMPLE

Technology and contract review

Northstar Group · Snapshot: 8 October 2026 (UTC)
Prepared for your advisor-led client review

51 contracts are in the six-month review window.

The window covers $60,867.60 in monthly recurring charges — 80.0% of the listed portfolio. Eight contracts end this October. Validate notice terms now: a notice deadline may require action earlier than a six-month review trigger.

65 active services	$76,121.20 monthly recurring charges
10 locations represented	51 contracts in the review window

Sample currency: USD, assumed for this synthetic example. Listed customer prices; tax treatment is unknown. $913,454.40 is monthly charges × 12, not actual annual invoicing, a forecast or committed spend.

Your priorities

1. Verify near-term contracts. London dedicated access ends 9 October, Munich dedicated access 11 October and Toronto collaboration 15 October. Check signed terms, service need and notice requirements.

2. Review the largest exposure. Compare technically suitable alternatives for the 51 contracts before deciding whether to renew, change or consolidate services.

3. Establish a health baseline. No monitoring observations accompany this inventory. Agree which services to monitor and the measurement window before reporting uptime.

What we need from your team

Confirm service owners and planned site, headcount or technology changes. Share signed renewal and cancellation terms so your advisor can validate deadlines.

02 / CONTRACTS

Contract and renewal priorities

A recorded end date is a review signal; it does not establish automatic disconnection or a cancellation deadline.

Recorded end period	Services	Monthly charges
8–31 Oct 2026	8	$14,380.30
Nov 2026	11	$9,670.20
Dec 2026	14	$19,641.10
Jan 2027	8	$4,858.00
Feb 2027	4	$7,950.00
Mar 2027	4	$2,303.00
1–8 Apr 2027	2	$2,065.00
Total in window	51	$60,867.60

Make the decision before the deadline.

All 65 records have unknown notice and auto-renewal terms. A six-calendar-month review trigger is separate from the notice deadline in the signed agreement. Verify the contract before relying on either date.

Start with London, Munich and Toronto.

London dedicated access: $2,450.00 monthly, end date 9 October. Munich dedicated access: $1,600.50 monthly, end date 11 October. Toronto collaboration: $2,115.00 monthly, end date 15 October. These are fictional records, not provider quotes.

Your decision record

For each service: signed agreement → verified notice terms → business requirements → like-for-like alternatives → authorized client decision. Nothing in this sample renews, cancels or orders a service.

03 / SERVICES

A useful portfolio view

Organize the account before making a recommendation. Connect service inventory, contract evidence and business priorities.

Service category	Services	Monthly charges
Cloud	9	$13,183.00
Hardware	6	$2,652.00
Internet	16	$18,118.50
Network	14	$11,657.60
Other	1	$405.00
Security	10	$17,037.70
Voice	9	$13,067.40
Total	65	$76,121.20

Purchasing classification

52 in-network records account for $70,565.80 monthly; 13 out-of-network records account for $5,555.40. These labels describe purchasing relationships, not service quality, uptime or availability.

Monitoring is not yet measured.

There are no monitoring observations in the supplied inventory. Missing observations do not mean 0% uptime. Define monitored services, endpoints, measurement intervals and escalation owners before drawing conclusions.

Ten fictional locations

Redmond, Dublin, London, Munich, Toronto, North Sydney, Singapore, Tokyo, Paris and Amsterdam. Location coverage here does not establish any supplier footprint.

04 / NEXT ACTIONS

From visibility to a review plan

Assign an owner, gather the evidence and bring a clear recommendation back to the client.

Sample target	Next action	Decision / evidence
8 Oct	Check the eight October contracts	Signed terms, notice deadlines and owner
15 Oct	Review the 51 contracts in the window	Requirements, status and next step
22 Oct	Reconcile invoice and inventory records	Billing discrepancies and verified charges
22 Oct	Establish the monitoring baseline	Endpoints, measurement window and escalation
Before each decision	Compare technically suitable options	Client approval of renewal or change

A repeatable advisor conversation

Discover: load the service register and signed agreements.
Qualify: validate owners, dates, spend and business changes.
Review: surface renewal exposure, coverage gaps and expansion needs.
Recommend: compare fit, cost and delivery assumptions.
Approve: record the authorized client decision.
Follow through: coordinate quotes, orders, projects and ongoing support.

Use the review to earn the next conversation.

A structured account review gives partners a concrete starting point with new clients, an enterprise-style working document for larger buying teams, and a way to discuss additional sites and service categories. Those are intended uses, not measured growth or savings outcomes.

Sample limitations

Fictional services and client identity. No achieved savings, provider availability, live customer relationship, or production report-generation capability is represented. Sample action targets are not appointments. USD is assumed; tax and notice terms remain unknown.