

AUTOMATE **Intermediate** 20 MIN · UPDATED 2026-09-30

Track software license allocation and usage.

Analyze license usage data to surface underused or over-allocated software licenses before the next renewal.

MICROSOFT 365

Excel

WORKS WITH

Claude

Copilot

Business Outcome

Lower software spend by right-sizing license counts to actual usage before renewal, instead of auto-renewing at last year's count.

Workflow Steps

Step 1: Pull allocation and usage into one view

Excel

Use XLOOKUP to pull each user's last-login and usage-frequency data onto the same row as their license allocation, combined into one Excel Table — allocation data alone tells you who has a license, not who's actually using it, and the gap between those two is the entire point of this workflow.

Step 2: Ask Copilot to surface the outliers

Copilot

Claude

Have it identify licenses assigned but unused over a defined window, and departments or teams whose active usage is closing in on their license cap.

PROMPT

Using this license allocation and usage export, flag every license assigned to a user with zero logins in the past 60 days, and flag any team whose active usage is above 90% of their allocated license count.

Step 3: Verify before reclaiming anything

Excel

Check with the license owner or the user's manager before reclaiming a license — a user on extended leave or in a role that uses the tool infrequently but critically shouldn't get silently cut off.

Step 4: Feed the findings into the renewal decision

Excel

Use the confirmed underused and over-allocated lists to right-size the license count ahead of the next renewal cycle, rather than defaulting to the prior year's number.

✓ Check the work

- Confirm the "zero usage" window used matches what's actually meaningful for that tool — some tools are used quarterly, not daily.
- Check with the affected team before reclaiming any license flagged as underused.
- Reconcile the over-allocation flags against actual license cap numbers from the vendor contract, not an assumed number.



Expected Outcome

A list of licenses flagged as underused (candidates to reclaim) or over-allocated (candidates to true up), with the specific usage data behind each flag.

Want help rolling this out across your team? **Go to Liminals.Tech** ■