

AUDIT REPORT · CONFIDENTIAL

Independence Audit

Which tools create dependence, which questions are still open, and what should happen next.

1	\$12,422	1	1
TOOLS REVIEWED	COST PER YEAR	URGENT ITEM	OPEN FACT

PREPARED FOR
Sample Company Inc.

INDUSTRY
—

CONTACT
Jordan Sample

EMPLOYEES
—

DATE
June 24, 2026

IT SUPPORT
—

01 What this report says

We reviewed **1 tool**. Together it costs roughly **\$12,422 per year**. The result: **1 item is urgent**, 0 items are important, and 0 items are currently unremarkable.

MOST IMPORTANT ITEM

Microsoft 365

Don't switch yet. First close the open facts — the vendor's data location and contract terms haven't been confirmed.

COST PICTURE & POSSIBLE SAVINGS

If everything stays as it is, the tools reviewed cost about **\$71,436 over five years**.

The current \$12,422/yr sits in tools for which a self-hosted alternative already exists.

What we found

- For **1 tool**, it is still unclear where the data actually lives and who can access it.
- For **1 tool**, hold off on any big decision — facts are missing first.
- From **1 tool**, getting back out would be hard based on the information given (lock-in).
- The largest single cost is **Microsoft 365** at \$12,422 per year.

IN ONE SENTENCE

Look at Microsoft 365 first. Important: don't switch yet — first confirm the open facts (where data lives, export, and contract terms).

ACTION

02 The next steps

This list is the most important page in the report. It doesn't say abstractly that something needs doing — it says what to do next, concretely.

1 Microsoft 365

URGENT

Confirm the vendor's legal home, data-processing terms, and storage region. **Don't switch yet. First close the open facts.**

WHY "DON'T SWITCH YET"

When facts are missing, the right recommendation is not "switch immediately." The right recommendation is: first confirm in writing where the data lives, whether a full export is possible, and which contract terms apply.

Before any decision, check

- Vendor's legal home, data-processing agreement (DPA), and storage region.
- Test a real data export: format, completeness, and re-import.
- Check at least one realistic alternative against your must-have criteria.
- Document a continuity/outage plan: who does what if the service goes down?

03 The key tools in detail

For each tool: what the problem is, why it matters, and what should happen next.

1 • Microsoft 365

SAAS • MICROSOFT

DATA LOCATION: UNCONFIRMED

URGENT

The problem

Microsoft 365 bundles daily work: email, calendar, documents, spreadsheets, and often sign-in and file storage too. That means a great deal of operational work hangs on a single vendor.

Why that’s a problem

The vendor’s data location and access terms are unconfirmed. That needs clarifying, because office services are where communication, documents, and personal information all come together.

What happens if nothing changes

License costs and switching effort keep rising. A later exit gets more expensive as more and more processes become tied to the platform.

The direction

The direction is a self-hosted or independently operated office & groupware suite. A staged move makes sense: start with file storage or a single team, then email and calendar.

CLASSIFICATION

DON'T SWITCH YET. FIRST CONFIRM THE OPEN FACTS. · Switching: hard to reverse (high lock-in).

If it goes down	BUSINESS-CRITICAL
Take all data with you	NO, OR UNCLEAR
Switching effort	VERY HIGH
Viable alternative	TO BE CHECKED
Especially sensitive information	YES

WORK LIST

04 What needs to be done internally

This table can go straight into an internal meeting or to your IT provider.

TASK	TOOL	WHY?	OWNER	BY WHEN	STATUS
Confirm vendor's legal home, data-processing terms, and storage region.	Microsoft 365	Don't switch yet. First close the open facts.	set internally	14 days	OPEN
Test a real data export — format, completeness, re-import.	Microsoft 365	Confirms whether you can actually leave with your data.	set internally	30 days	OPEN
Check one realistic alternative against must-have criteria.	Microsoft 365	Gives a credible fallback and negotiating position.	set internally	30 days	OPEN
Document a continuity/outage plan.	Microsoft 365	So an outage doesn't become a standstill.	set internally	30 days	OPEN

HOW TO USE THIS

Assign an owner and a date to each row. Unclear answers aren't proof of a problem — they only mean the question must be settled in writing before any big decision.

05 Vendor inquiry

When details are missing, you don't need a debate — you need written answers. You can send this text to the vendor as-is.

Subject: Questions on data hosting, export and data-processing terms — Microsoft 365

Hello,

We're currently reviewing our software independence and would appreciate brief written answers regarding Microsoft 365:

1. In which countries is our data stored and processed (including subprocessors)?
2. Is there a current data-processing agreement (DPA) in place?
3. Can we fully export all of our data? If so, in which formats?
4. Are there technical or contractual restrictions if we switch providers?
5. What deletion and backup retention periods apply to our data?

Thank you — best regards.

PRACTICAL EFFECT

You turn open assumptions directly into solid, on-the-record vendor answers.

COST

06 What it costs to keep going

This page is not a quote. It only shows where ongoing rental costs and dependence come together.

TOOL	RENT (5 YRS)	OWN / SELF-HOST (5 YRS)*	APPROX. SAVINGS
Microsoft 365	\$71,436	\$18,633 – \$29,813	\$41,623



* Rough orientation values from cost and switching effort — not a quote. Rent assumption: 7% price increase per year over 5 years. Self-host range covers setup plus operation; the lower end assumes more in-house administration.

THE POINT

After five years of renting, you have nothing. After five years of owning, you have a productive platform in your name — ready to hand over.

OVERVIEW

07 All tools at a glance

A simple inventory: which tool, which vendor, which data, what to do.

TOOL	VENDOR	WHERE'S THE DATA?	WHICH DATA?	URGENT?	WHAT TO DO
Microsoft 365	Microsoft	UNCONFIRMED	Documents, email, customer data	URGENT	Don't switch yet. First close the open facts.

LARGEST SINGLE COST

\$12,422/yr

Microsoft 365

HARD TO EXIT

1 tool

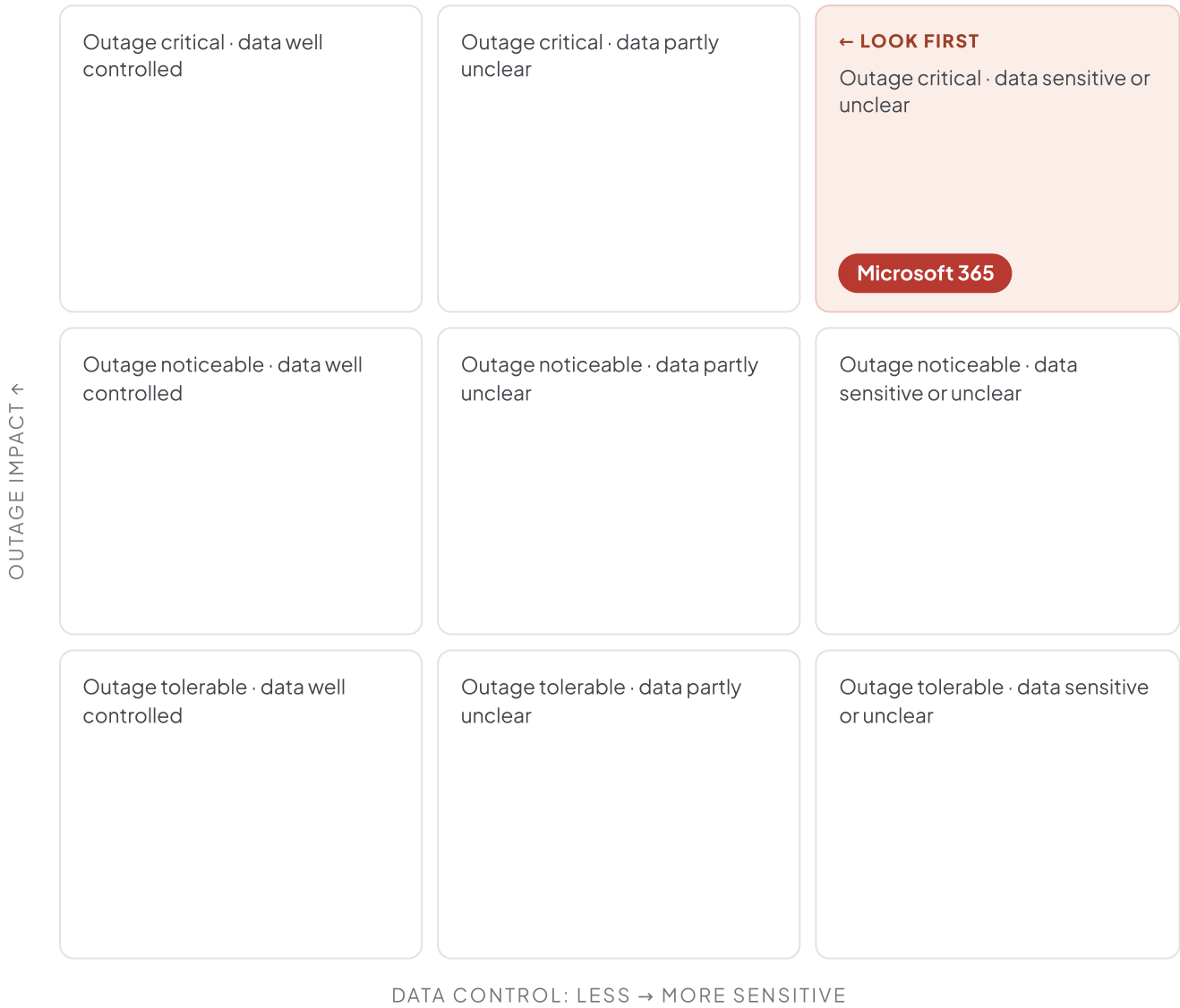
High lock-in based on the information given.

RULE OF THUMB

The more important tools hang on a few vendors, the harder an outage, a price hike, or a difficult switch will hit you.

08 Where it gets risky

Higher up, an outage hurts more. Further right, data location or access is more sensitive. Top-right means: look at it first.



09 Where regulated data may be affected

This isn't about fear. It's about knowing, in writing, where customer, employee, or contact data lives — and who can access it.

Current status: across the tools reviewed, no clear case of sensitive personal data sitting with an unverified third party is visible — but the data location of Microsoft 365 is still unconfirmed and should be settled in writing.

NOTE — NOT LEGAL ADVICE

Where personal or regulated data is involved, confirm in writing where it is stored and who can access it. Depending on your industry, frameworks such as **SOC 2**, **HIPAA**, or **CCPA** may apply, and your contracts should reflect them. For any vendor, check whether third parties can compel access to your data.

AREA	STATUS FROM THE DATA COLLECTED
Sensitive data with an unverified third party	No clear case from the data collected.
Important tools needing a continuity plan	1 tool should be documented for outage, recovery, and ownership of responsibilities.

10 How the assessment was made

The main report avoids math and jargon. For transparency, the reasoning is documented here.

The short version of the assessment

This table translates the scoring into everyday language. It answers: is the item urgent? Can we get out easily? What should we do?

TOOL	HOW URGENT?	HOW HARD TO SWITCH?	WHAT IT MEANS
Microsoft 365	URGENT	HARD TO REVERSE	Don't switch yet. First close the open facts.

REPRODUCIBLE

The exact point-by-point scoring ships with the report as a machine-readable **.audit.json** file. It records which inputs led to which rating. The client report deliberately shows the meaning, not the math.

TOOL	HOW CONFIDENT ARE THE ANSWERS?	OPEN QUESTIONS	NEXT CHECK
Microsoft 365	STILL UNCERTAIN	Where exactly does the data live? Can we take it all with us? Which alternative is viable?	Confirm legal home, DPA, and storage region; test a real export; check one alternative; document an outage plan.

Important: unclear answers are not proof of a problem. They only say that, before a big decision, this question must be settled in writing.

CONTEXT

11 Why this isn't a black box

NexaStack can also help with the implementation later. The report stays verifiable either way: it names categories, open questions, and next steps — with no hidden obligation to buy.

- **You can ask.** Every recommendation traces back to a specific tool and concrete details.
- **You can check it yourself.** The vendor questions, work list, and evidence file are all included.
- **You don't have to rebuild right away.** Where answers are uncertain, the report deliberately says “close the facts first.”

Categories & examples to research

CATEGORY	EXAMPLES TO RESEARCH
Groupware / Office	Nextcloud Groupware, Zoho, self-hosted mail & calendar
File storage / collaboration	Nextcloud, ownCloud Infinite Scale, Seafile
CRM	Odoo, SuiteCRM, EspoCRM
Newsletter / email marketing	Listmonk, Mailtrain, Mautic
Hosting / infrastructure	Reputable providers with a clear, contractually stated data region
ERP / inventory	Odoo, ERPNext, industry-specific providers

Neutrality: this list is not a ranking and not a recommendation. What matters is your requirements, data export, operation, support, data location, and cost.

NEXT STEP

Want this for your own tools? Request the intake form — the full Independence Audit is a flat \$490 and credited toward your first project. nexastack.co/en/audit