

The End of Auto-Renewal Regret

How a Mid-Sized Asset Manager Took Back Control of Its Vendor Stack

Overview

For a mid-sized asset manager managing just under \$20B in AUM, the real challenge wasn't finding new tools—it was keeping track of the ones they already had.

Dozens of data and software subscriptions renewed automatically every year, often without review or insight into usage or value. Sidelight changed that—bringing visibility, accountability, and measurable ROI to their vendor ecosystem.

The Problem: Silent Renewals

With a small ops team and a fragmented stack of analytics tools, data feeds, and research platforms, subscriptions were renewing automatically—unchecked and unnoticed.

The team uncovered a pattern:

- Many contracts renewed without anyone validating usage
- Some tools hadn't been actively used in over a year
- Renewal notices were missed, and vendors were dictating terms
- No consistent process existed for assessing vendor value

These “set it and forget it” tools were creating real drag on operating margins—and no one could answer the question: Are we even using this?

The Turning Point: Partnering with Sidelight

The firm implemented Sidelight to shine a light on their renewal pipeline and put internal controls in place—without needing a large procurement department.

ABOUT SIDELIGHT

Sidelight is an AI-powered platform purpose-built for financial services. We combine real usage data, engagement intelligence, and peer benchmarking to help firms take full control of their vendor stack—eliminating overspend, surfacing trusted alternatives, and turning renewals into opportunities.

We exist to bring transparency to an opaque ecosystem—empowering smarter decisions, stronger performance, and lasting value.



Cost & Subscription Module

- Created a live map of all data and software tools, with renewal dates and costs
- Flagged six high-cost vendors for immediate review
- Surfaced overlapping tools between portfolio and research teams

Contracts AI Module

- Centralized vendor contracts for the first time
- Triggered alerts 60 days before renewals
- Assigned internal “owners” to each subscription to ensure accountability

Value Module

- Collected direct user feedback on usage and perceived value
- Identified three underused tools still renewing on autopilot
- Supported smarter reallocation of budget toward higher-impact services

Key Business Impact

In less than a quarter, the firm:

- Canceled or renegotiated \$320K in underused subscriptions
- Prevented four auto-renewals that were previously flying under the radar
- Brought clarity and structure to renewal decision-making
- Built a lightweight but effective vendor governance model

Why It Matters

For mid-sized asset managers, every tool and every contract counts. With tighter teams and growing demands, it's easy for renewals to go unnoticed—and for waste to become normalized.

Sidelight changed the script:

- From passive renewals to active decisions.
- From guesswork to clarity.
- From vendor-driven terms to data-backed negotiations.

“

We're a lean team, and Sidelight gave us exactly what we needed—visibility. Now we can finally answer: What are we paying for, who's using it, and does it matter?

Chief Operating Officer

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How many silent renewals are draining your budget?

Let us help you find them and better understand the true value they bring to your firm.

→ [Request a demo today](#)