

EQUIPMENT CONTROL READINESS CHECKLIST

Planning for 2025

This checklist is designed to evaluate your organization's readiness for effective equipment control. Please mark each statement as either true or false by checking the corresponding box. At the end of the checklist, you'll find a scoring system to determine your overall readiness level.

Visibility and Accountability

- ☐ We have a centralized system for tracking all equipment assets.
- ☐ Each piece of equipment is uniquely identified with a barcode, RFID tag, or other tracking method.
- ☐ We maintain a detailed record of each asset's location, status, and ownership.
- ☐ Regular audits are conducted to verify the accuracy of equipment records.
- ☐ Clear roles and responsibilities are defined for equipment custodianship.
- ☐ We have a process for reporting and investigating equipment loss or theft.

Scheduling and Dispatch

- ☐ Equipment requests are submitted through a standardized process.
- ☐ A centralized scheduling system is used to manage equipment availability.
- ☐ Conflicts in equipment scheduling are proactively identified and resolved.
- ☐ Dispatch procedures ensure that the right equipment is delivered to the right location at the right time.
- ☐ Equipment utilization rates are regularly monitored to optimize resource allocation.
- ☐ Users are trained on proper equipment operation and safety procedures prior to dispatch.

Maintenance and Inspections

- ❑ A preventive maintenance schedule is established for all critical equipment.
- ❑ Maintenance records are meticulously maintained, including dates, services performed, and parts replaced.
- ❑ Regular inspections are conducted to identify potential equipment failures.
- ❑ A system is in place for reporting and tracking equipment defects.
- ❑ Downtime is minimized through efficient repair processes.
- ❑ Safety inspections are conducted before and after each use of equipment.

Rentals and Utilization

- ❑ A clear policy exists for equipment rentals (internal and external).
- ❑ Rental agreements are properly documented and tracked.
- ❑ Equipment is efficiently allocated to projects to maximize utilization.
- ❑ Utilization rates are monitored to identify underutilized assets.
- ❑ Equipment is returned promptly after use.
- ❑ A process exists to assess and optimize equipment rental costs.

Finance and Reporting

- ❑ Accurate records of equipment purchases, depreciation, and disposal are maintained.
- ❑ Equipment-related costs are tracked and allocated appropriately.
- ❑ Regular reports are generated on equipment inventory, utilization, and maintenance costs.
- ❑ Financial data is used to make informed decisions about equipment investments.
- ❑ Budgeting processes incorporate equipment life cycle costs.
- ❑ We can easily track the total cost of ownership for each piece of equipment.

Technology and Adoption

- ❑ We use technology (e.g., software, mobile apps) to manage equipment control.
- ❑ Equipment data is integrated across different systems.

- ☐ Users are adequately trained on the use of equipment management technologies.
- ☐ The equipment management system is regularly updated and maintained.
- ☐ We leverage data analytics to improve equipment control processes.
- ☐ We are actively exploring emerging technologies to enhance equipment management.

Scoring and Readiness Levels

Instructions: Count the number of boxes you checked across all sections. Use the following scoring system to determine your readiness level:

- **0-10 Boxes Checked: Foundational.** Significant improvements are needed in equipment control processes.
- **11-20 Boxes Checked: Developing.** Basic equipment control practices are in place, but there is room for optimization.
- **21-30 Boxes Checked: Established.** Solid equipment control processes are in place, with ongoing monitoring and improvement.
- **31-36 Boxes Checked: Leading.** Best-in-class equipment control practices are in place, driving significant value for the organization.

