Asset Management Platform Evaluation Checklist

Consistent platform comparison requires the same asset, workflow, user roles, and reporting requirements across every vendor evaluation.

1. Asset Tracking & Lifecycle

- [ ] Create an asset record with required fields and categories
- [ ] Import existing asset data in bulk
- [ ] Track asset location, custody, status, and ownership
- [ ] Scan assets using barcode or QR codes
- [ ] View a complete asset history and audit trail
- [ ] Transfer assets between users, locations, or departments
- [ ] Check assets in and out
- [ ] Reserve assets for future use
- [ ] Track depreciation and financial information
- [ ] Retire or dispose of assets while preserving historical records

2. Requests, Approvals & Fulfillment

- [ ] Submit an asset or equipment request through a self-service portal
- [ ] Capture requester, asset, location, and business context
- [ ] Route requests through configurable approval workflows
- [ ] Support multiple approval levels where required
- [ ] Track pending, approved, rejected, and completed requests
- [ ] Give operators a centralized queue for fulfillment
- [ ] Maintain a record of approvals and fulfillment actions
- [ ] Notify relevant users when request status changes

3. Maintenance & Workflows

- [ ] Create preventive maintenance schedules
- [ ] Trigger maintenance based on time, usage, or meter readings

- [ ] Create and assign work orders
- [ ] Track maintenance history against the asset
- [ ] Record labor, parts, costs, and service notes
- [ ] Support recurring inspections and checklists
- [ ] Escalate overdue maintenance
- [ ] Provide technicians with mobile access to assigned work

4. Multi-Site Operations

- [ ] Manage assets across multiple sites or facilities
- [ ] Control user access by role, location, or department
- [ ] Transfer assets between sites without losing history
- [ ] View availability by location
- [ ] Standardize workflows across sites
- [ ] Report on individual sites and the organization as a whole

5. Reporting & Analytics

Use the same reporting scenario for every vendor.

- [ ] Build the reports currently used by the team
- [ ] Filter reports by asset type, location, owner, status, or date
- [ ] Create or customize dashboards
- [ ] Schedule recurring reports
- [ ] Export data in required formats
- [ ] Drill from summary metrics into underlying asset records
- [ ] Report on utilization, maintenance, costs, and lifecycle activity
- [ ] Confirm which reporting capabilities are included in the proposed plan

6. Mobile & Field Use

- [ ] Access asset records from a mobile device
- [ ] Scan barcodes or QR codes using a phone or tablet
- [ ] Check assets in or out from the field
- [ ] Update asset status and location
- [ ] Complete inspections or maintenance tasks
- [ ] Attach photos, notes, or supporting documents
- [ ] Confirm whether critical workflows work in low-connectivity environments

7. Automation & Notifications

- [ ] Automate repetitive asset-management tasks
- [ ] Trigger actions when asset status or conditions change
- [ ] Configure alerts for overdue returns or maintenance
- [ ] Automate approval routing

- [ ] Schedule recurring actions or notifications
- [ ] Confirm which automation capabilities require higher-tier plans

8. Integrations & Data Access

- [ ] Confirm integrations with existing business systems
- [ ] Test the integrations most important to the workflow
- [ ] Confirm API availability
- [ ] Review API limits and plan restrictions
- [ ] Support SSO or identity-provider integration if required
- [ ] Import and export data without vendor assistance
- [ ] Confirm how easily data can be retrieved if the platform is discontinued

9. Administration & Governance

- [ ] Configure custom fields, categories, statuses, and workflows
- [ ] Set granular roles and permissions
- [ ] Maintain a traceable audit history
- [ ] Configure required fields and validation rules
- [ ] Support multiple departments or business units
- [ ] Confirm security, compliance, backup, and data-retention controls

10. Implementation & Support

- [ ] Ask who manages implementation
- [ ] Confirm expected implementation requirements
- [ ] Understand data migration support
- [ ] Review administrator and end-user training
- [ ] Confirm available support channels
- [ ] Ask whether a named implementation or customer-success contact is provided
- [ ] Review support response commitments
- [ ] Speak with a reference customer with similar requirements if possible

11. Pricing & Packaging

- [ ] Request pricing based on the same number of users, assets, and locations
- [ ] Identify the plan required for every must-have capability
- [ ] Check for implementation or onboarding fees
- [ ] Check for additional charges for integrations, APIs, reporting, or support
- [ ] Understand limits on users, locations, assets, workflows, or storage
- [ ] Compare total estimated cost over three years
- [ ] Identify features demonstrated during the sales process that are not included in the quoted plan

12. Run the Same Evaluation Scenario

For each vendor, complete one realistic end-to-end workflow.

- [ ] Create or import the same asset
- [ ] Assign it to the same location and user
- [ ] Submit the same request
- [ ] Run the same approval process
- [ ] Check out or transfer the asset
- [ ] Record the same maintenance activity
- [ ] Return or reassign the asset
- [ ] Produce the same management report
- [ ] Record how many steps, screens, and manual workarounds were required

Final Scorecard

Rate each vendor from 1–5.

Evaluation Area	**Vendor 1**	**Vendor 2**	**Vendor 3**
Asset lifecycle management			
Requests & approvals			
Maintenance			
Multi-site operations			
Reporting & analytics			
Mobile usability			
Automation			
Integrations			
Administration & governance			
Implementation & support			
Pricing & overall value			
Total			

Final Verification

Before selecting a platform, verify that every must-have capability is available in the exact plan being quoted, not simply available somewhere in the vendor’s product.