

HOW TO PERFORM AN IT ASSET DISPOSITION PLAN SELF-ASSESSMENT

COMPLETE ITAD SELF-ASSESSMENT GUIDE

Organizations that lack an actively managed and well thought-out IT asset disposition (ITAD) program may be exposing themselves to unnecessary risks and costing themselves money. If you believe your organization may be more reactive than proactive in its handling of retired and accumulated surplus IT assets, it is time to assess your program and take ownership of the process, aligning the goals and objectives of your organization with its ITAD resources.

By developing a well-documented ITAD program, you can achieve these benefits for your organization — for every location, for every asset type and quantity, every time.

- **Financial.** IT assets are just that – assets. Even after they are written down to zero on your books, many of those assets have market value. The right program will maximize that value across all of your assets and locations, reducing the total cost of ownership (TCO).
- **Data security.** A good ITAD program will ensure that corporate security, compliance, and risk management policies and procedures are met. It will minimize the risk of any data breach and create auditable records for compliance and peace of mind. A solid ITAD process is a secure process, with proof.
- **Environmental.** You need assured compliance with all local, state, and federal environmental regulations, and the evidence that you have diverted every possible bit of material from landfills back into the supply chain. Beyond compliance, you want to ensure all aspects of your program contribute to your environmental stewardship goals.
- **Efficiency.** Resources are always in short supply. ITAD needs to be done, and done right. A good program will make the process as efficient as possible so your resources can focus more of their time on their primary role.

To develop the best program for your organization, you first need to determine your needs, priorities, and the current state of your ITAD program. Then you can analyze the gaps between your priorities and the actual process and its results. This will enable you to develop a plan of action and an improved process for the future.

Here are the key steps for an IT asset disposition program assessment.

IDENTIFY AND INTERVIEW ALL STAKEHOLDERS

Who are the ITAD stakeholders in your organization? Make sure to include all of them. If your organization has multiple business units or locations, be sure to include them too.



Stakeholders will include many, if not all, of the following:

STAKEHOLDER EXPERTISE	STAKEHOLDER NAME
IT executive management	
IT asset management (whether it's an official title, or just the people who do the job)	
Compliance	
Risk management	
IT/data security	
Sustainability/green team	
Data center management/operations	
Facilities	
Logistics	
Finance	
Purchasing/supply chain/vendor management	



Once you have identified all the stakeholders, interview them. Some of the questions you should ask them are:

What do they see as the priority in the ITAD process?

Here's a list of ideas to start with – don't limit yourself to these:

- ☐ Lower TCO
- ☐ No-cost ITAD
- ☐ Higher returns on remarketed equipment
- ☐ Data security
- ☐ Environmental compliance
- ☐ Speedy disposition
- ☐ More detailed reports/audits
- ☐ Internal resource requirement reduction
- ☐ Chain of custody
- ☐ Standardization across the organization

What should the goals be for the ITAD program?

What concerns do they have?

How do these priorities fit in with the broader organizational goals and strategies?

DOCUMENT THE CURRENT STATE OF THE ITAD PROGRAM

Before you can develop a new IT asset disposition program, it's necessary to develop a complete understanding of what your current processes really are, and who is doing what.

- Do you have a strong understanding of the distribution of your assets across your geographic footprint? Do you know the details of those assets (hardware specifications, software)? How detailed and accurate is your asset management system?
- Which of your assets are leased, and which are owned? Do the same people manage the disposition for each group of assets?"
- Who manages ITAD for each location and/or department? Make a list or a grid. Be sure to include all assets: desktop, mobile, data center, network, etc.
- Who is ultimately responsible for ITAD decisions? How are decisions made on which assets to retire, when, and how to do it?
- Which budget(s) pay for the assets? Which pays for the disposition? Where does any return from remarketing go?
- Do you have historic data on your ITAD program for the whole organization? How frequently does your organization have an asset disposition project? What is the average number of assets per project? Associate the costs/returns for each location/disposition and get a total for the past year.

DOCUMENT CURRENT VENDORS AND CONTRACTS

If your company partners with vendors for data destruction, remarketing, or recycling, the success of your program depends on the ability and reliability of those vendors. While you are assessing your ITAD program, you should also assess the vendor(s) you are using, how your company's relationship with service providers is structured, and how satisfied everyone is with the service levels. Make another grid.



What certifications do each of your vendors hold? Be sure you have proof. Ask to see the certificates if you have not done so, or check the certification websites.

VENDOR NAME	CERTIFICATION

Which locations does each vendor serve for you today? What locations could they serve?

VENDOR	LOCATION SERVED	COULD SERVE



What services does each vendor currently provide to you? What other services do they offer?

Include at least the following:

- ☐ Remarketing/resale
- ☐ Data sanitization (wipe hard drives)
- ☐ Data destruction (physical destruction of tapes or hard drives)
- ☐ Recycling
- ☐ Small site/small volume pickups
- ☐ Detailed audits/reports

What Service Level Agreement is in place, or what is the vendors' actual service level, especially in regard to:

- ☐ Time from request to pickup
- ☐ Time for reporting, financial reconciliation
- ☐ Responsiveness to queries

Do you have a contractual relationship with your vendors, and if so, what is the term of each contract? Who manages each one?

VENDOR	CONTRACT STATUS	MANAGER

Rate each vendor (this should be done by the people who deal directly with each vendor most often). Some categories to include in your rating:

- ☐ Responsiveness
- ☐ Reliability
- ☐ Quality
- ☐ Reporting
- ☐ Account/project management
- ☐ Ability to service each location

DEFINE GOALS FOR THE ITAD PROGRAM

Based on the interviews with stakeholders and users, develop clear goals for the ITAD program. This should include a discussion of the trade-offs that have to be made based on the overall priorities. For example, the goals of highest possible remarket value and highest possible data security may not be compatible if the data security policy in your organization is to destroy all hard drives.

The goals and trade-offs should have the consensus backing of the key stakeholders interviewed in Step 1. The most successful ITAD program will be clear on goals and priorities. These will be aligned with your organization's overall strategic goals and other business processes.



Financial Return



Data Security



Environmental Compliance



Process Efficiency

REPORT AND ANALYZE

After collecting the details of your organization's IT asset disposition process and setting the goals, the analysis can be performed. The recommended approach will include the following:



- ☐ **Interviews:** List everyone interviewed, with their roles and involvement in ITAD.
- ☐ **Current State:** A summary of the organization and requirements, highlighting the existing ITAD program and vendor relationships.
- ☐ **Strengths and Weaknesses:** A summary of the current program based on the interviews with stakeholders and users.
- ☐ **Goals and Objectives:** Clearly stated goals of the ITAD program going forward.
- ☐ **Gap Analysis:** For each area of concern or goal, describe or (better) chart the gap, and describe the reasons for the current gap.
- ☐ **Recommendations:** What should you do to close each of the gaps you have identified? How will you make that happen?

A key part of this report is the gap analysis. You might find this to be the most useful outcome of the self-assessment. Based on the data gathered throughout the assessment process, the gap analysis will identify opportunities for improvement (OFIs). Your new ITAD program should use these to incorporate new standards and processes to meet your organization's goals and requirements.

Performing a thorough ITAD assessment and analysis is time-consuming, and getting objective feedback from internal sources can sometimes be difficult. LifeSpan has experienced team members who can help you design the assessment, conduct interviews, and do the analysis with you.

Dedicated ITAD Professional	
Disposition Process Assessment	
GAP Analysis	
Next Gen ITAD Implementation Plan	

LifeSpan's Next Gen ITAD Program

Sign up for a FREE 360 degree ITAD assessment and see what a next generation disposition process looks like for your company.

Click to apply for LifeSpan's exclusive Next Gen ITAD Program

NEXT STEPS - NOW WHAT?

A next generation ITAD program can enhance data security, reduce risks, reduce costs and increase returns, all while aligning the program with your organization's strategy and goals. A well planned program will ensure that your internal resources' time is spent as productively as possible while also making it as easy as possible for them to meet your requirements.

Performing a thorough assessment and analysis takes some time and effort. The payback on that investment can be significant.

If you do your own assessment, share the details with your ITAD partners so they can help you meet your goals. If you don't have the resources to perform the assessment yourself, find a partner who can assist you.

LifeSpan offers a formal assessment and analysis program. Contact us to find out how we can help you.

Dedicated ITAD Professional	
Disposition Process Assessment	
GAP Analysis	
Next Gen ITAD Implementation Plan	

LifeSpan's Next Gen ITAD Program

Sign up for a FREE 360 degree ITAD assessment and see what a next generation disposition process looks like for your company.

Click to apply for LifeSpan's exclusive Next Gen ITAD Program