tequipy

IT Asset Management Checklist

40 tasks from setup to disposal. Version 1, October 2026. tequipy.com

Company	[company name]
Checklist owner	[name]
Last reviewed	[yyyy-mm-dd]
Next review	[yyyy-mm-dd]

Name the owners

Role	Name
IT lead	[name]
Deputy for IT lead	[name]
IT support	[name]
People Ops	[name]
Finance	[name]
Procurement	[name]

How to use

- Tick Done and write the date.
- Write a name, never a team.
- Part 1 is done once. Part 5 is the calendar.
- Every number marked * is a suggested default and yours to change.

Part 1: Foundation (9 tasks)

#	Task	Owner	Trigger or frequency	Done
1	Decide which device types the register covers, and the value below which accessories are not tracked*.	IT lead	Once; yearly review	☐
2	Write the IT asset policy: who may hold what, how to report a loss, the duty to return.	IT lead with People Ops	Once; yearly review	☐
3	Put the return duty in the employment contract or equipment agreement.	People Ops	Once; every new contract template	☐
4	Name one owner and one deputy for each stage: buy, deploy, repair, recover, dispose.	IT lead	Once; on any role change	☐
5	Set up the register with the serial number as the unique key.	IT lead	Once	☐
6	Load existing devices from invoices, the MDM export and the HR list.	IT support	Once	☐
7	Connect the HR system so a hire or a leaver creates a task.	IT lead with People Ops	Once	☐
8	Set the asset ID format and label every device that has none.	IT support	Once	☐
9	Decide, for each country, where a device goes between users: an office, a storage provider or a named person.	IT lead	Once; on entering a new country	☐

Part 2: Purchase and Deployment (7 tasks)

#	Task	Owner	Trigger or frequency	Done
10	Name one approved buying channel per country.	Procurement	Once; yearly review	☐
11	Keep one standard device per role and review it.	IT lead	Yearly	☐
12	Record invoice, cost, currency and the legal entity that paid.	Procurement	Each purchase	☐
13	Add the device to the register from the invoice, before it ships.	Procurement	Each purchase	☐
14	Record the warranty end date and any extended cover.	IT support	Each purchase	☐
15	Send invoices above the capitalisation threshold to Finance.	Procurement	Each purchase	☐
16	Run the joiner tasks in the IT onboarding and offboarding checklist.	People Ops	Each hire	☐

Part 3: Devices in Use (7 tasks)

#	Task	Owner	Trigger or frequency	Done
17	Log every repair, swap and loan against the serial.	IT support	Each ticket	☐
18	Collect the old device when a replacement ships.	IT support	Each swap	☐
19	Give every loan device a return date*.	IT support	Each loan	☐
20	Update the record when a device changes hands or country.	IT support	Each move	☐
21	Lock or wipe a lost or stolen device remotely and record it.	IT support	Same day as the report*	☐
22	List devices due for replacement by warranty end or age.	IT lead	Quarterly	☐
23	Re-confirm the device with its holder after long leave.	IT support	On return from leave	☐

Part 4: Recovery and Disposal (7 tasks)

#	Task	Owner	Trigger or frequency	Done
24	Run the leaver tasks in the IT onboarding and offboarding checklist.	People Ops	Each leaver	☐
25	Set the longest time a returned device may wait before it is reused or sold (90 days*).	IT lead	Once; yearly review	☐
26	Release the serial from Apple Business (formerly Apple Business Manager) or Autopilot and delete it from the MDM before sale or recycling.	IT support	Before disposal	☐
27	Record the sell-back value against the asset.	Finance	On sale	☐
28	Recycle through a certified recycler and keep the certificate.	IT lead	On disposal	☐
29	Close the asset in the finance records.	Finance	On disposal	☐
30	Mark the record Retired; never delete it.	IT support	On disposal	☐

Part 5: Recurring Routines (10 tasks)

#	Task	Owner	Trigger or frequency	Done
31	Review open collections and overdue returns.	IT support	Weekly	☐
32	Match this week's deliveries against new register rows.	Procurement	Weekly	☐
33	List devices with no MDM check-in for 30 days*.	IT support	Monthly	☐
34	Match the register against the MDM list and the HR roster; investigate every device that appears in only one.	IT lead	Monthly	☐
35	Reclaim unused software seats.	IT lead with Finance	Monthly	☐
36	Run the ten-asset spot check.	IT lead	Quarterly	☐
37	Review devices that passed the storage limit from task 25.	IT lead	Quarterly	☐
38	Check every retired serial has a wipe or destruction certificate on file.	IT lead	Quarterly	☐
39	Review and update the whole register.	IT lead	Every six months (CIS Safeguard 1.1 asks for at least twice a year)	☐
40	Review the policy, the owners and this checklist; report the KPIs.	IT lead	Yearly	☐

IT asset management KPIs

KPI	What it measures	Review cadence	This quarter
Register accuracy	Share of devices in the ten-asset spot check whose record matched the device, its holder and its place	Quarterly (task 36)	
Devices silent in the MDM for 30+ days	Number of devices with no MDM check-in for 30 days or more	Monthly (task 33)	
Devices delivered before the start date	Share of new joiners whose device arrived before their first day	Monthly	
Devices returned at offboarding	Share of leavers whose devices came back	Monthly	
Days from leaver confirmed to device in hand	Average days from the leaver notice to the device received	Monthly	
Devices past the storage limit	Number of returned devices waiting longer than the limit in task 25	Quarterly (task 37)	
Licence utilisation	Share of paid software seats in use	Monthly (task 35)	
Share of the fleet in warranty	Share of active devices whose warranty end date is still ahead	Quarterly (task 22)	