

ITAD Planning Guide

A comprehensive walkthrough for building an internal IT Asset Disposition (ITAD) policy — covering asset tracking, data security, vendor selection, and compliance documentation.

1. Define Your ITAD Policy Framework

- 1 Establish ownership across IT, Security, and Procurement teams.
- 2 Define scope: endpoints, servers, mobile devices, networking gear.
- 3 Align ITAD policy with corporate security and ESG objectives.

2. Asset Inventory & Tracking

- 1 Maintain a centralized asset register.
- 2 Track lifecycle stages from deployment to end-of-life.
- 3 Ensure accurate tagging (serial number, user, location).
- 4 Integrate with ITAM or CMDB systems.

3. Data Security & Sanitization Standards

- 1 Define approved data destruction standards (NIST SP 800-88).
- 2 Determine when to use wiping vs physical destruction.
- 3 Ensure verification and audit trails for all data sanitization.
- 4 Implement secure handling procedures prior to processing.

4. Chain of Custody & Logistics

- 1 Establish secure pickup and transportation processes.
- 2 Document custody at every transfer point.
- 3 Use tamper-evident packaging and secure storage.
- 4 Ensure real-time tracking and visibility of assets.

5. Vendor Selection & Due Diligence

- 1 Select certified ITAD providers (R2v3, ISO standards).
- 2 Review downstream vendor controls and audit practices.
- 3 Assess global capabilities if operating across regions.
- 4 Validate insurance coverage and compliance credentials.

6. Value Recovery Strategy

- 1 Identify assets eligible for refurbishment and resale.
- 2 Define remarketing and revenue-sharing models.
- 3 Incorporate parts harvesting for non-redeployable devices.
- 4 Track financial recovery vs disposal costs.

7. Environmental & ESG Considerations

- 1 Track e-waste diversion and recycling rates.
- 2 Measure carbon impact and sustainability outcomes.
- 3 Ensure compliance with environmental regulations.
- 4 Support ESG reporting with auditable data.

8. Compliance & Documentation

- 1 Maintain certificates of data destruction and recycling.
- 2 Keep audit logs and chain-of-custody records.
- 3 Align with PIPEDA, GDPR, and other regulatory requirements.
- 4 Prepare documentation for internal and external audits.

9. Reporting & Continuous Improvement

- 1 Implement regular reporting dashboards.
- 2 Track KPIs: turnaround time, recovery value, compliance rates.
- 3 Conduct periodic vendor reviews.

4 Continuously refine ITAD processes and policies.

Best Practice: A structured ITAD program reduces risk, maximizes asset value, and ensures full compliance. Organizations that treat ITAD as a strategic function—not a disposal task—gain measurable financial and operational advantages.

