

The Equipment Hire Operations Checklist

A practical checklist for plant, tool and site-equipment hire teams

Use this checklist to identify where equipment gets lost, delayed, damaged or left idle. Mark each item **in place**, **partly in place**, or **not yet in place**.

1. Asset visibility

- ☐ Every asset has a unique ID, QR code or tracker.
- ☐ The team can see whether each asset is available, on hire, on site, in maintenance or overdue.
- ☐ The last known location and status are recorded for tracked assets.
- ☐ Lost signal, low battery and overdue returns are flagged promptly.

2. Bookings and dispatch

- ☐ Availability is checked before promising equipment to a customer.
- ☐ Each booking records the customer, site, dates, required assets and responsible team member.
- ☐ Dispatch staff can scan equipment out from the yard or depot.
- ☐ Condition is recorded before equipment leaves the depot.
- ☐ Customer or engineer sign-off is captured at handover.

3. Field operations

- ☐ Engineers can access their job list and site information on a phone.
- ☐ Risk assessments and checklists are completed consistently.
- ☐ Photos and notes are attached to the correct asset or booking.
- ☐ Site credentials and sensitive access details are controlled and audited.

4. Returns and damage

- ☐ Returns are checked against the original dispatch condition.
- ☐ Damage, missing parts and cleaning requirements are recorded with photos.

- ☐ Customer and engineer signatures are captured when the hire closes.
- ☐ Overdue returns have a clear owner and follow-up process.

5. Reporting and improvement

- ☐ The team can report utilisation by asset, category or depot.
- ☐ Maintenance and inspection dates are visible before equipment is dispatched.
- ☐ Management can see overdue assets, lost trackers and outstanding actions.
- ☐ Operational data is not spread across disconnected spreadsheets, paper packs and WhatsApp threads.

What your results mean

Mostly in place: your core process is working. Look for automation opportunities that reduce admin and give the team faster visibility.

A mix of partly in place and not yet in place: you probably have avoidable delays and data gaps between the yard, dispatch desk and field team. Start with asset status, dispatch condition and returns.

Mostly not yet in place: your operation may be relying heavily on memory, spreadsheets or messages. A single operational record for assets, bookings and sign-off can create an immediate improvement.

The five questions to ask this week

1. Which assets are currently on hire but have no confirmed location?
2. Which returns are overdue, and who owns each follow-up?
3. Can the yard team prove the condition of an asset before dispatch?
4. How long does it take to answer “where is this asset?”
5. Which spreadsheet, paper form or message thread would cause the biggest problem if it disappeared?

Equipy helps equipment-hire teams track assets, dispatch equipment, capture condition and sign-off, and manage returns from one operational system. Learn more at <https://equipy.io>.