



# STEP-BY-STEP GUIDE OF THE ITAD PROCESS

An easy guide to know more about IT Asset Disposition.



Here to provide  
you with the  
best service!



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# Introduction

## Introduction

In the digital age, organizations must regularly update their IT infrastructure to remain competitive, secure, and efficient. However, the responsible and secure disposition of outdated or surplus IT assets is a complex challenge. Improper handling can result in data breaches, environmental harm, and lost value.

## CDR Global's ITAD Process

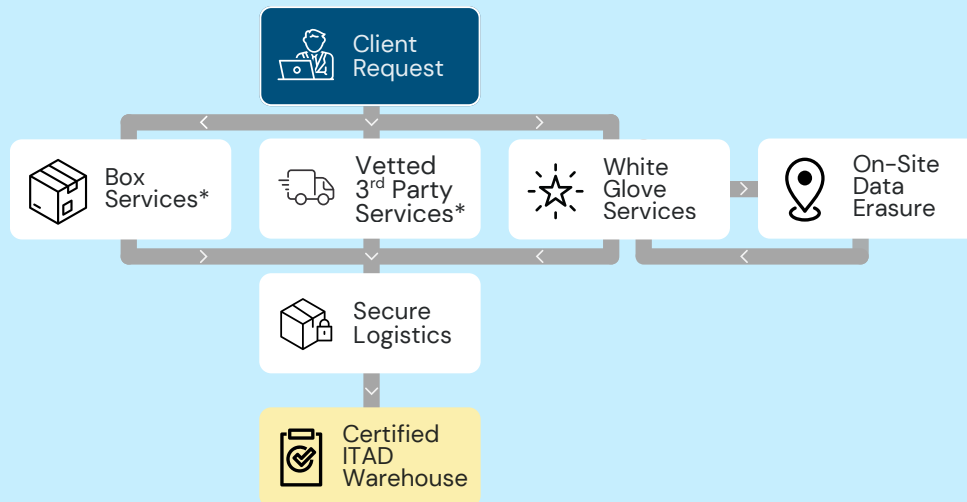
**IT Asset Disposition (ITAD)** is the process that addresses these challenges, ensuring that end-of-life IT assets are managed securely, responsibly, and efficiently.

Whether you are an IT manager, business owner, or simply interested in how organizations handle their old technology, this document will provide a comprehensive understanding of the ITAD process.

This guide outlines the main steps of the ITAD process as managed by CDR Global.

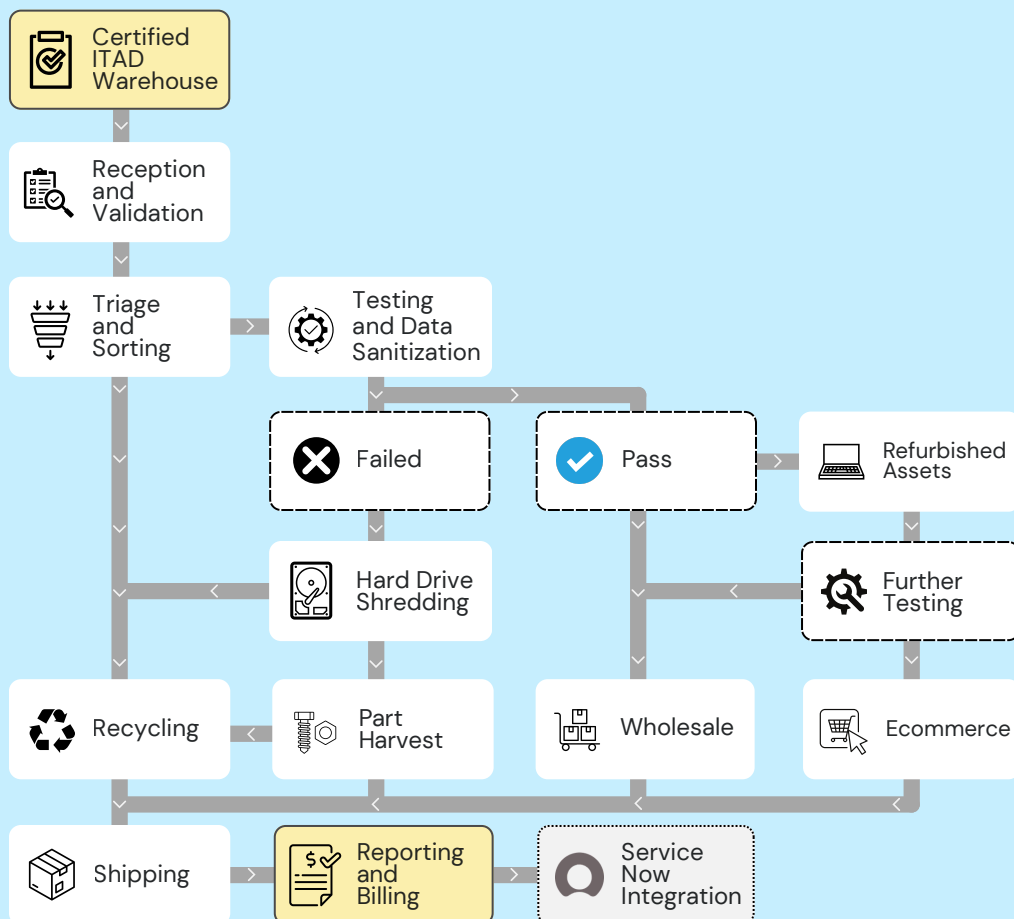
# ITAD Process

## On-Site Steps



\*These services may not be NAID Certified.

## Facility Steps



Note: Every service offered directly by CDR Global meets NAID Certification requirements, ensuring secure and compliant handling.



# Client Request

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The **ITAD process** begins when a client—such as a business, school, or government agency—identifies IT equipment that is no longer needed. The client initiates a request for ITAD services from CDR Global, which can be done in several ways.

## Preferred method

- **Client Portal:** The preferred and most efficient method, where the client submits a request through CDR Global's online portal. This allows for automated tracking, faster response times, and a clear record of the request.

There are additional support options available for requesting equipment pickup:

- **Phone Call:** The client contacts CDR Global directly to discuss their needs and provide details about the equipment to our logistics team.
- **Email:** The client sends an email to their assigned account rep outlining the types and quantities of equipment to be disposed of, along with any special requirements or supporting documents.

Once the request is received, CDR Global reviews the details, clarifies any uncertainties, and begins planning the logistics for secure and compliant asset disposition.



# Logistics & Transportation



After confirming the client's request, CDR Global arranges for the secure transportation of the equipment from the client's site to the ITAD facility. There are several transportation options, each designed to ensure the safety and security of the assets:

- **White Glove Service:** The CDR Global team visits the client's location and carefully packs the equipment using specialized materials such as anti-static bags, foam inserts, and custom boxes for laptops or networking gear. The equipment is then transported using company-owned vehicles. This logistics service is NAID certified.

This service includes GPS tracking, security cameras, and lock boxes to ensure maximum security. Clients can monitor the shipment in real time, providing added peace of mind.



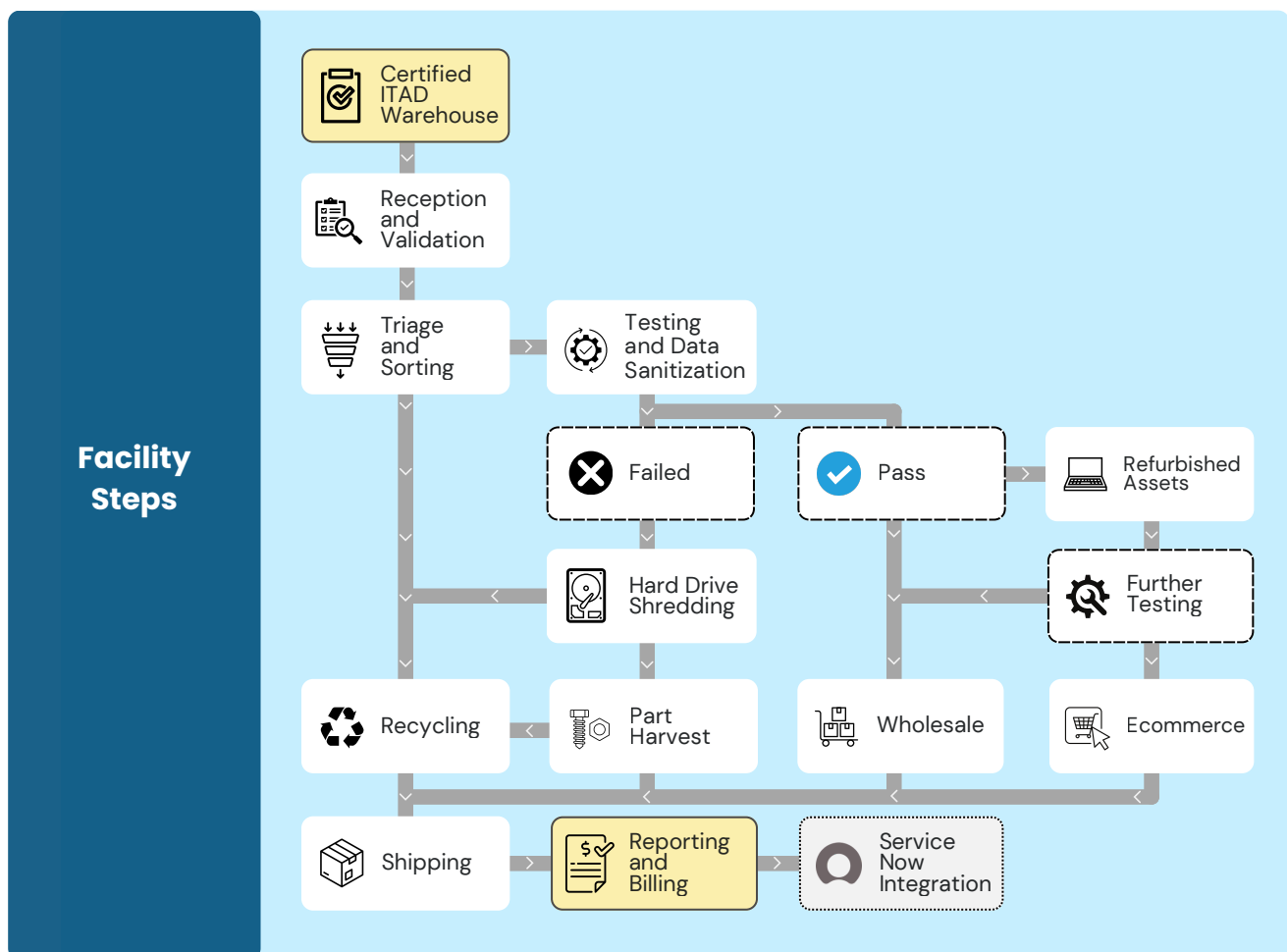
# Logistics & Transportation



- **Third-Party Logistics:** Vetted and insured carriers are used by CDR Global to pick up the equipment. These carriers may collect items that are already packed or handle the packing themselves. They are carefully selected to ensure reliability, security, and compliance with industry standards.
- **Box Program:** The client receives special boxes and detailed instructions for packing the equipment. Once packed, the client ships the boxes back to the ITAD facility using a prepaid return label. The client can drop off the boxes at a local shipping center or request a pickup. This method is particularly useful for smaller quantities of equipment or remote locations.

All transportation methods are designed to protect both the equipment and any sensitive data it may contain. Insurance coverage and chain-of-custody documentation are standard, ensuring accountability at every step.

# WAREHOUSE STEPS



Note: Every service offered directly by CDR Global meets NAID Certification requirements, ensuring secure and compliant handling.



# Reception & Validation



Upon arrival at the warehouse, the equipment undergoes a thorough reception and validation process:

- **Check-In:** The CDR Global team checks in all items, recording details such as the weight of each pallet, the number of pallets, and the source of the equipment. Each item is assigned a **UID** (unique identifier) for tracking.
- **Verification:** The team verifies that all items listed by the client have arrived and are in the expected condition. This step ensures nothing is missing or damaged during transport.
- **Receiving Report:** An automated email is sent to the client, confirming that their equipment has been received by CDR Global. The report includes details like weights, quantities, and any special instructions for processing.
- **Compliance:** The process follows industry standards (such as R2v3), ensuring that all equipment is handled responsibly and securely.

This step establishes a clear chain of custody and provides the client with immediate confirmation that their assets are in safe hands with CDR Global.

# Triage & Sorting



The next step is to sort the equipment based on its condition and to determine the most appropriate next action:

- **Recycling:** Items that are too old, broken, or obsolete to be reused are set aside for recycling. These items are sorted by type (e.g., *metals, plastics, electronics*) and prepared for shipment to vetted downstream vendors.

Note: CDR Global regularly audits these vendors to ensure they meet strict environmental and security standards.

- **Testing:** Equipment that might still be useful is sent for further testing and auditing by specialized technicians. This includes checking for functionality and determining whether the item can be reused, refurbished, or resold.

Triage and sorting are performed by trained CDR Global technicians who follow detailed procedures to ensure accuracy and compliance.

# Testing & Data Sanitization



The testing and processing step determines the final fate of each item:

- **Non Data-Bearing Devices:** Items like monitors, projectors, and TVs (which do not store data) are tested for key functions. If they fail testing, usable parts are harvested, and the rest is recycled.

If they pass, they are either sold in bulk (wholesale) or sent for refurbishment.

- **Data-Bearing Devices:** Items like computers, servers, and hard drives (which store sensitive data) are tested and wiped using industry-standard data erasure tools by CDR Global. If a device or drive fails to wipe (due to bad sectors or hardware issues), it is physically destroyed (shredded), and a **Certificate of Data Destruction (CoDD)** is generated for the client.

If it passes, it is either sold wholesale or refurbished for resale.

All data destruction is performed according to strict protocols, and detailed records are kept for every device, including the parent and child relationship for the internal hard drives. This step is critical for protecting client data and ensuring compliance with privacy regulations.



# Part Harvest, Wholesale & Refurbishment



Items that pass testing and are suitable for reuse go through refurbishment and redeployment by CDR Global:

- **Part Harvest:** Items that cannot be reused as a whole but contain valuable components are disassembled. Usable parts (such as memory modules, processors, and power supplies) are harvested for future use or resale, while the remaining materials are recycled.
- **Wholesale:** Equipment that is still valuable and functional may be sold in bulk to other companies or resellers by CDR Global. This is often done by the pallet and is a common route for items that are still in demand but not needed by the original client.
- **Refurbishment:** Some items are cleaned, repaired, and updated (including installing new operating systems or replacing worn-out parts) so they can be used again, either by the original client or by someone else.

Refurbishment not only extends the life of IT equipment but also provides affordable technology options for other organizations and individuals.



# Sale

Once items are ready for sale, CDR Global manages the sales process, either in bulk (wholesale) or individually (e-commerce):

- **Recycling:** Items that cannot be reused or resold are sent to R2v3 certified recycling partners, ensuring environmentally responsible disposal.
- **Wholesale:** Items are sold in bulk to dealers or other companies, often by the pallet. This is a fast and efficient way to move large quantities of equipment.
- **E-Commerce:** Individual items are sold directly to end users through online platforms. Refurbished items are often listed for sale on multiple online platforms (e.g., eBay, Amazon, Shopify, Walmart) using an omnichannel tool managed by CDR Global.

Specialty or unusual items are matched with appropriate buyers, even if it requires extra effort to find the right market.

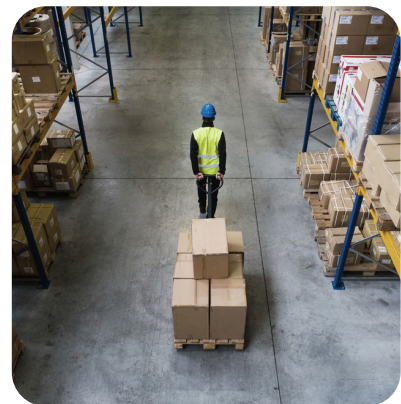
All sales comply with legal and certification requirements, including export controls and country restrictions.

# Shipping



After a sale is made, CDR Global handles all shipping logistics:

- **Secure Packaging:** Items are carefully packed to prevent damage during transit.
- **Tracking:** All shipments are tracked, and clients or buyers are provided with tracking information.
- **Compliance:** Shipments comply with all relevant regulations, including those governing the export of electronics and data-bearing devices.





# Report & Billing



The step is comprehensive reporting and billing:

- Detailed Reports: Clients receive detailed reports showing the outcome of each asset—whether it was recycled, sold, refurbished, or destroyed. This includes Certificates of Data Destruction for all data-bearing devices including the parent device which it was removed from.
- Revenue Sharing: If items are sold, the client receives a share of the revenue, minus any fees or costs.

Invoices and Purchase Orders: All financial transactions are documented, and clients receive invoices or purchase orders as appropriate.

# Integration & ServiceNow



## Integration & Data Management

CDR Global's secure portal stores all data collected from client devices throughout the ITAD process. Clients can easily access detailed records, track assets, view certificates of data destruction, and check the lifecycle stage of each item.

## ServiceNow

All collected data is automatically integrated into the client's **ServiceNow platform**. This allows clients to view equipment records and manage ITAD workflows directly within their own ServiceNow environment, making the process more efficient and organized.

# Certifications



A key part of the ITAD process is ensuring that all activities are performed according to industry standards and regulations. Certifications provide assurance that CDR Global follows best practices for data security, environmental responsibility, and legal compliance. Common certifications include:

- **R2V3 (Responsible Recycling):** Ensures responsible recycling practices for electronics.
- **ISO 9001:** Consistently delivering high-quality products and services that meet customer and regulatory standards.
- **ISO 14001:** Environmental management standards.
- **ISO 45001:** Commitment to provide a safe and healthy workplace for employees and visitors.
- **NAID (National Association for Information Destruction):** Focuses on secure data destruction.


These certifications help clients trust that their equipment and data are handled safely, securely, and in an environmentally responsible way by CDR Global.






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