

# The ITAD Iceberg:

## How to Navigate Risks waiting Below the surface

IAITAM ACE, Las Vegas 2024


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NextraTech.com



Let's discuss how we can unlock  
value, mitigate risks and navigate  
the depths in your ITAD program



## Our Story:

After serving in the war effort  
w/Panasonic Toughbook's  
from 2001 to 2011

In 2011 PlanITROI became a  
Social Enterprise.

Definition of a Social Enterprise:  
“Make Money to do Good”

In 2024 PlanITROI became a  
wholly owned subsidiary of  
NEXTRA TECH

The ITAD industries first collective  
of independent ITAD  
companies



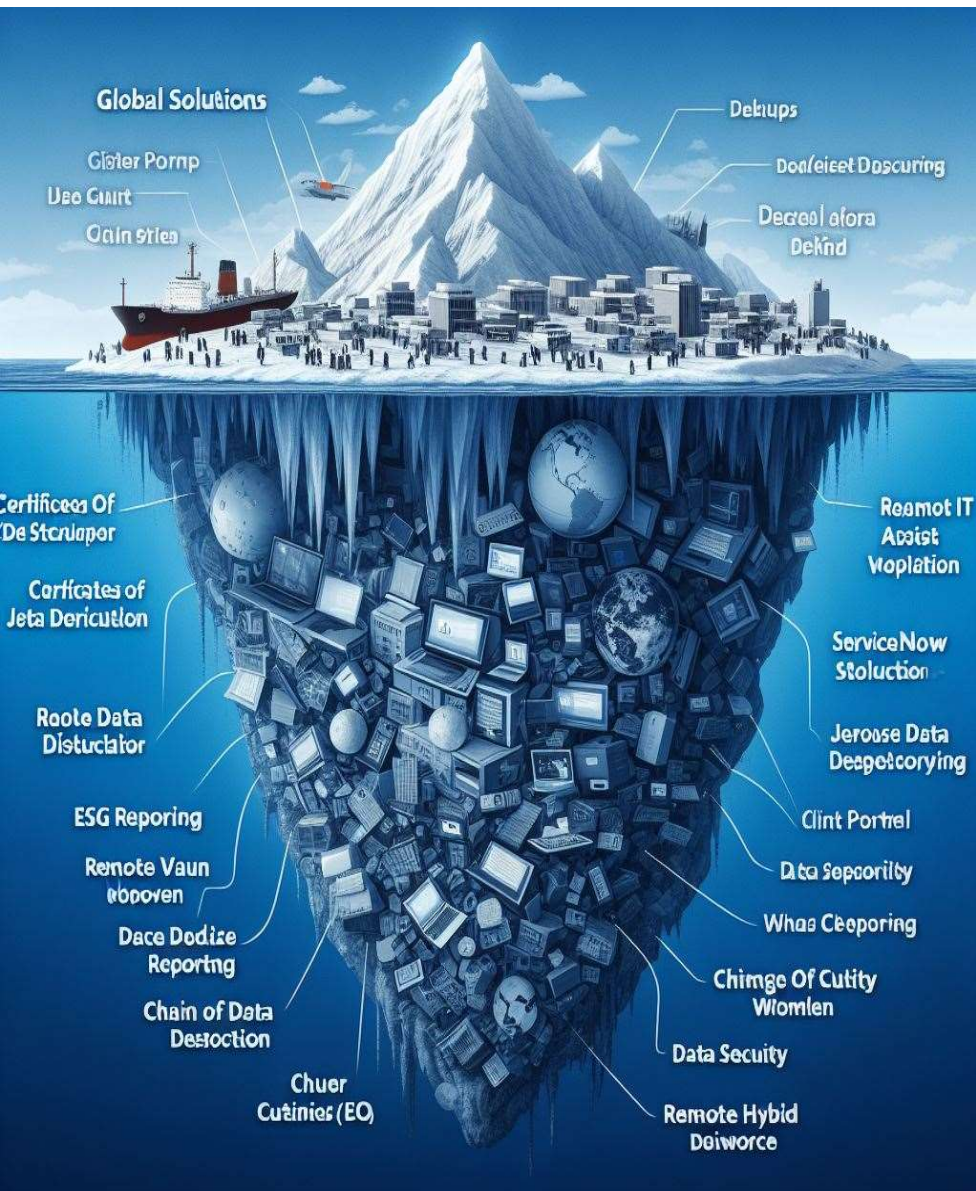


**Paul Baum**  
CEO & Founder  
pbaum@planitroi.com  
PlanITROI.com

I am a “People First” entrepreneur who is passionate about “Closing the Digital Divide with Affordable Technology” by disrupting the current IT Asset Disposition model. I enjoy teaching our client suppliers about the next user of their retired assets. And how their retired assets, refurbished and recertified, make a huge impact for students, families and small businesses caught in the digital divide through PlanITROI Secure Purpose Driven ITAD business model.

Since 2001, **PlanITROI** has been closing the digital divide with affordable technology from our clients retired IT assets. PlanITROI’s 100% data secure approach helps organizations achieve critical Environmental Social Governance (ESG) & Corporate Social Responsibility (CSR) goals while recovering the highest possible value for their assets, paying for their ITAD programs.





# The ITAD Iceberg

In the dynamic world of IT asset management, the iceberg metaphor holds true - what lies beneath the surface often holds the key to unlocking value and mitigating risks. As an IT Asset Manager, you hold the power to navigate the depths of IT Asset Disposition (ITAD), unveiling global solutions that address a wide range of challenges facing your organization.

# The ITAD Iceberg: How to Avoid the 5 Major Risks Waiting below the surface

1. **Low Asset Recoveries** leads to **Costly & Underperforming** ITAD programs
  - > How are your Assets sold? Wholesale B2B Bulk or Premium Retail B2C/D2C?
2. **Data Security Risks** due to ITAD vendor unprofitability and/or increased labor costs
  - > 30%+ labor increase = increased risk of cutting corners to save money, how can you tell?
3. Are **your** retired PC's **Windows Licenses** being **sold at your risk** without your knowledge
  - > MAR = Legal Secondary Resale VS. Illegal Reloading without MAR license, how can you tell?
4. Over recycling of your **Valued Assets** VS. being resold to your organizations benefit
  - > ITAD's low/no service fees, low wholesale values leads to recycling valued assets, how can you tell?
5. Inaccurate, Inconsistent or Non-Existent **Reporting and ESG measurements**
  - > Lack of standardized reporting and global ESG measurements, who's to follow "UN vs. EPA vs. ?"



## #1 Risk Below the Surface

Continued Low Recoveries on valued Assets such as Laptops, Servers, etc. has led to Costly & Underperforming ITAD Programs

WHY when demand is so high in 1<sup>st</sup> world countries?



# Lower PC Wholesale Values in “3<sup>rd</sup> World Countries”

- 99% of USA ITAD’s primary sale of your used IT is to 3<sup>rd</sup> World countries.
- Microsoft reported ~50,000,000 PC’s are retired in the USA annually with less than 2,000,000 sold as Microsoft Authorized Refurbished in the USA ~4% Sold in USA as Second Hand Computing PC’s.
- 3<sup>rd</sup> World countries lack funds for second hand used computing.
- 20 year highs in the US Dollar make used technology less attractive for resale overseas.
- Windows 11 demand for Ai driven applications



The screenshot shows a news article from E-Scrap News, a publication by Resource Recycling, Inc. The article title is "Computer resellers expect sluggish markets in 2023", published and updated on January 11, 2023, by Marissa Heffernan and Jared Paben. The article text states that Chris Ko, CEO and co-founder of electronics recycler ER2, has observed a 30% drop in demand for desktops and a 40% fall in pricing over the past year, while laptop demand remains steady.



# Wholesale Overseas Resale Creates Profitability Issues

Most ITAD's offer services 'at cost', as 'loss leader', or for 'free'.

## Average ITAD Costs Per Laptop:

- Transportation Costs
- Data Erasure Costs
- Processing Costs
- Compliance Costs

Revenue Share or FMV Buyout from the sale of used equipment doesn't even cover the off-sets losses for most ITAD's.

**\$20.00** Fee  
**-\$35.00** ITAD Cost  
**(\$15.00)** Loss

How long  
can ITAD's last  
upside down?





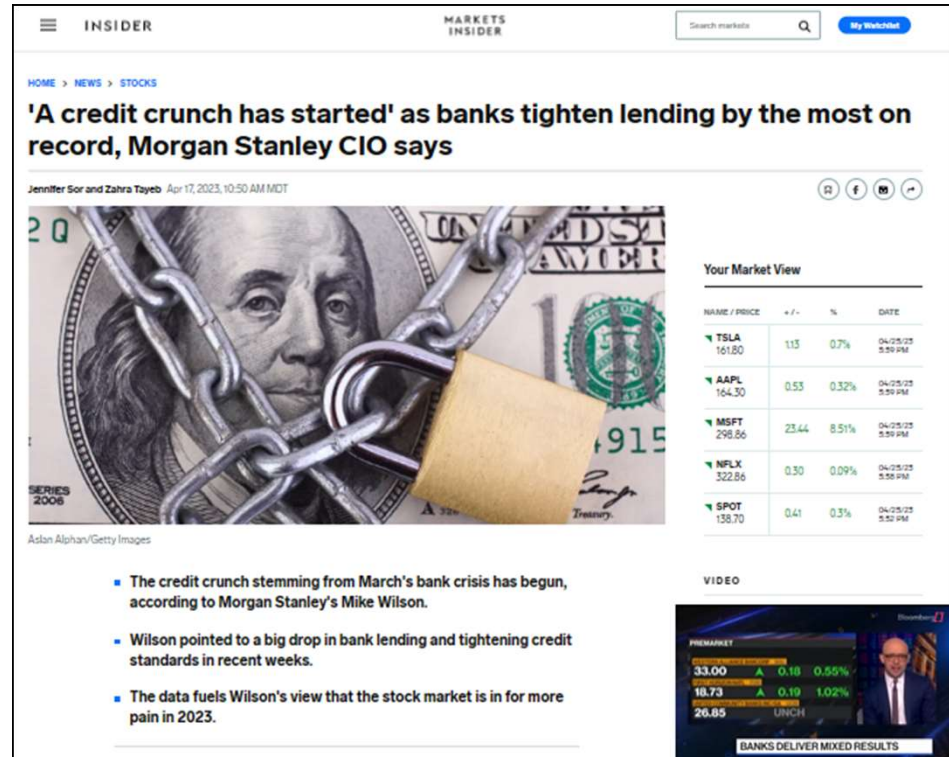
As a result of 99% of ITADs selling your assets to 3<sup>rd</sup> world countries with little to no Recovery it has affected their profitability and tightened Cash Flow

Why?



# Banks Tighten Asset-Based Lending (ABL) Loans

- ITAD's uses Resale Inventory to Secure Loans.
- There is a 'Credit Crunch' from rising interest rates.
- Most banks have tightened reigns on lending.
  - JPMorgan Chase
  - Bank of America
  - Wells Fargo
  - Citigroup
  - Etc...



The screenshot shows a news article on the Insider website. The headline is "'A credit crunch has started' as banks tighten lending by the most on record, Morgan Stanley CIO says". The article is dated April 17, 2023, at 10:50 AM MDT. The author is Jennifer Sor and Zahra Tayeb. The main image is a close-up of a US dollar bill with a padlock and chains, symbolizing a credit crunch. To the right of the article is a 'Your Market View' table with the following data:

NAME / PRICE	+/-	%	DATE
▼ TSLA 161.20	113	0.7%	04/25/23 3:59 PM
▼ AAPL 164.30	0.55	0.32%	04/25/23 3:59 PM
▼ MSFT 298.86	23.44	8.51%	04/25/23 3:59 PM
▼ NFLX 322.86	0.30	0.09%	04/25/23 3:59 PM
▼ SPOT 138.70	0.41	0.3%	04/25/23 3:52 PM

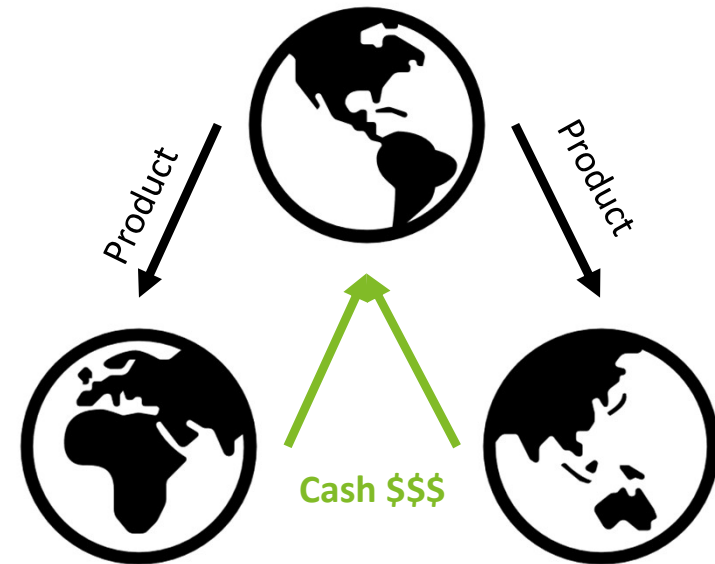
Below the table is a 'VIDEO' section with a thumbnail for 'BANKS DELIVER MIXED RESULTS'. The video content includes a 'PREMARKET' section with the following data:

PREMARKET	+	-	%
33.00	▲ 0.18		0.55%
18.73	▲ 0.19		1.02%
26.85			



# ITAD Vendors Use Prepayments from Wholesale for Cash

- Wholesale Overseas buyers pre-pay for equipment.
- Wholesale buyers are paying higher interest rates on their loans, which means lower prices.
- Prepayments lock ITADs into a vicious cycle of reliance on international wholesale.
- Wholesale buyers need fill an entire container and its taking long to fill since there is less inventory to sell and costs of containers are at an all time high.



The Costs & Risks of an Underperforming ITAD program due to your ITAD partner leading you down the wrong trail?

How would you know?



# Where your Recovery Goes Missing – More Recycling Why?

- Its easy for ITADs to Recycle your Valued Assets without you ever really knowing. They can say your equipment is not worth anything, so your reports say recycle, when its really sold Wholesale to keep them in business for another day.
- What can you do?
  - Check your valued assets resale vs. recycle value
  - Check your valued assets REAL RESALE Value by going on line and looking for your standard models being resold on all the Premium Retail markets.
  - If you find your NOT getting Premium Retail Returns for your valued assets than, hire an alternative ITAD Vendor that can demonstrate they have Premium Retail channel sales
  - 90% of all your Valued assets should be sold through these channels



## Look out for hidden and extra fees

- **Surcharges not discussed in the contract.**
- **Higher discretionary charges usually captured for repair and online sales.**
- **Unnecessary fees to count or inventory non-critical assets.**
- **Project and administrative fees.**
- **Price escalation clauses.**



## Look for Signs of Trouble = Are you not getting answers?

- Service levels, are they improving or getting worse?
- Waiting for revenue share checks?
- Waiting for pick-ups?
- Waiting for reports?



# Is your ITAD cutting corners for Survival – How would you know?

## E-SCRAP NEWS

A Resource Recycling, Inc. publication



### T-Mobile sues Belmont Trading for over \$6 million

In exchange for its services, Belmont Trading would retain a portion of sales revenue. After the contract was amended multiple times, Belmont Trading received service fees and remarketing percentages for used devices sold through its Asset Management Program, and it received 25% of sales revenue for end-of-life material sold through its Beyond Economic Repair (BER) program, the complaint states.

T-Mobile USA claims Belmont Trading has failed to remit to T-Mobile nearly \$6.6 million. The parties' agreement terminated on May 6, 2022. The complaint asks the court to award T-Mobile that sum, plus interest and legal costs.

## E-SCRAP NEWS

A Resource Recycling, Inc. publication



### The details on Apple's lawsuit against GEEP Canada

Apple claims GEEP Canada employees hid Apple devices out of view of an e-scrap facility's cameras, mislabeled devices as "copper bearings" for outbound shipping, and then received kickbacks for illegally reselling them.

E-Scrap News has obtained Canadian court records providing additional details about Apple's \$31 million-plus lawsuit against GEEP Canada, as well as GEEP's legal action against three of its former employees.





## Are you at Risk?

Mostly due to cutting corners, being under staffed and desperate for cash has many ITADs selling their clients assets including recycling – where procedures followed on data destruction?



**71%**

Inadvertent data breach/leak

(e.g., careless user causing accidental breach)



**68%**

Negligent data breach

(e.g., user willfully ignoring policy, but not malicious)



**61%**

Malicious data breach

(e.g., user willfully causing harm)



# Data Breaches on the Rise due to negligence & lack of Labor

- Data Destruction is the #1 leading risk associated with IT Asset Disposition.
- NAID AAA Certification provides an auditable means of ensuring your vendor is doing the right thing.
- ***Reports should share the device type and whether the device was sanitized or destroyed.***



**40%**

Used Devices Resold  
Contained Personally  
Identifiable Information

**“We know by the ongoing audits we conduct of NAID Certified service providers that when overwriting is properly done, it is a trustworthy and effect process. The problem lies with service providers who are not qualified.”**

– Robert Johnson, NAID CEO



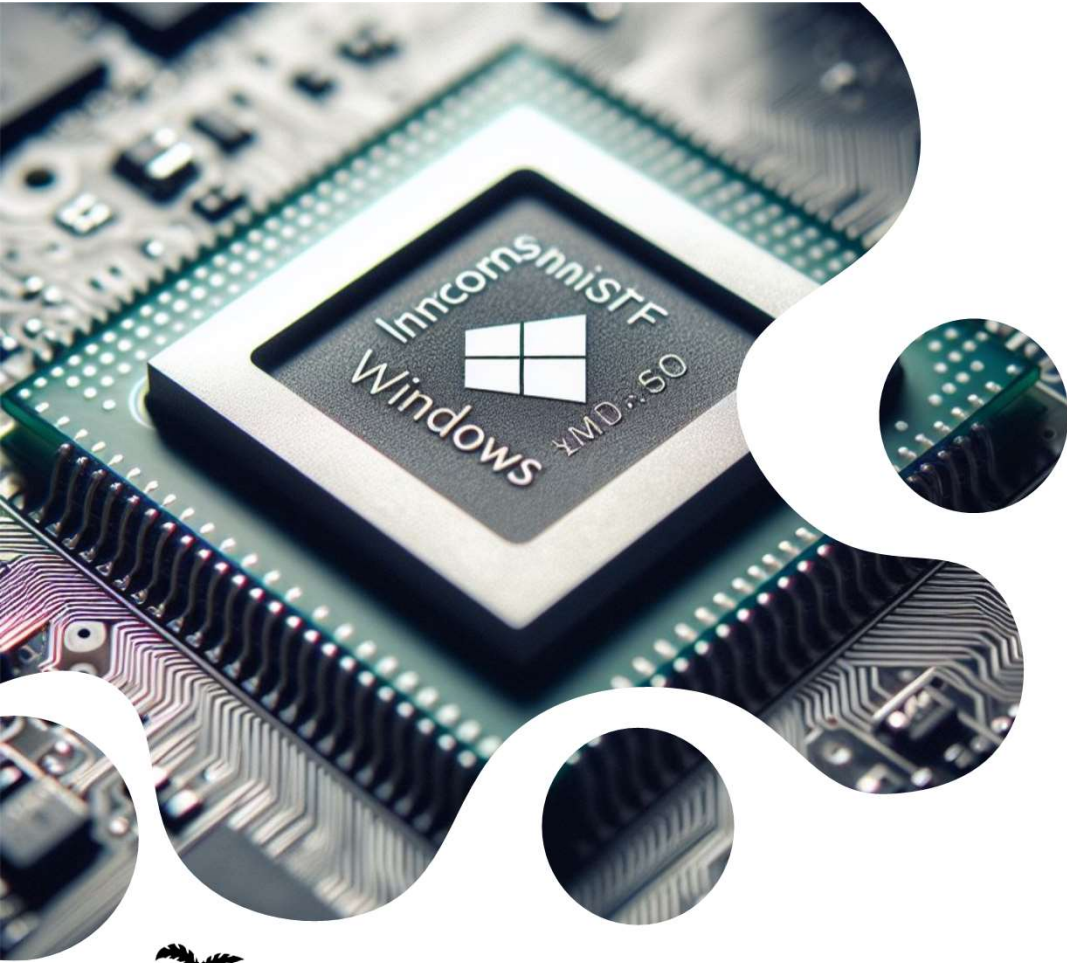
**1 out of 7**

World Population's  
Data Breached

**“If there ever was a part of life where the saying “what you don’t know can’t hurt you” is dead wrong, it would be with information technology asset management (ITAM).”**

– Dr. Barbara Rembiesa,  
Founder & President IAITAM





# The Sideloading Story: MAR vs. Illegal Licensing

You are probably looking in the wrong place - the Windows Key is now embedded in the BIOS chip

- Active license keys will automatically activate a new installation of Windows
- The only way to “Stop” this value leakage and licensing risk is to deactivate the key with Microsoft



# What's in your licensing wallet?

Deactivate Your Windows License Keys for Refurbished Devices - Do this today!

How much were you charged for Windows installation for software that you already paid for?

How many active Windows license keys do you *still* have open?

Is your ITAD company working with you to help you manage those keys to ensure that you are not at risk of EULA violations with Microsoft?



# Is your ITAD Partner a Certified MAR?

## The Risks of Unlawful Microsoft Windows Digital License Reuse

Even after performing a data wipe, there is a risk that your organization's digital Windows license could be illegally reused on a resold second-hand computer. Without the assistance of a Microsoft Authorized Refurbisher (MAR) to replace your digital Windows image with a new legally authorized MAR image, your computing resources could end up in someone else's possession, along with your organization's digital Windows licenses.

Microsoft audits are designed to detect license reuse, and once your license is out of your ITAD's hands, you will no longer have control over its usage. It is crucial to take proactive measures to protect your organization's licenses and maintain compliance.

**FINES PER COMPUTER OF ILLEGALLY USING WINDOWS SOFTWARE Pay full retail for a new license per PC \$199!!!**

Best Buy > Computers & Tablets > Software > Operating Systems

**Microsoft - Windows 11 Pro - English - Digital - English**  
Model: FQC-10572 SKU: 6498483 Release Date: 04/26/2022  
★★★★☆ 4.5 (39 Reviews) | 7 Answered Questions

**\$199.99** 4 payments starting at **\$50.00**  
or with **ZIPP**  
[Learn more](#)

**Digital Delivery**  
Available soon after purchase. Redemption information is emailed and available in your Order Details. Redeem in US only. Non-returnable. BestBuy.com account required to purchase.

**Microsoft**<sup>®</sup>  
**AUTHORIZED**  
*Refurbisher*

# Low or Zero Fee Contracts lead to going out of Business

Most ITAD's offer services 'at cost', as 'loss leader', or for 'free'.

## Average ITAD Costs Per Laptop:

- Transportation Costs
- Data Erasure Costs
- Processing Costs
- Compliance Costs

- NO FEES for MAR Licenses (Trouble)

Revenue Share or FMV Buyout from the sale of used equipment doesn't even cover the off-sets losses for most ITAD's.

**\$00.00** *Fee*  
**-\$35.00** *ITAD Cost*  
**(\$35.00)** *Loss*

How long  
can ITAD's last

**GOING OUT  
OF BUSINESS**



# Hundreds Left without forewarning and with no options



recycling  
today

Arrow says it has elected to initiate actions to close its information technology asset disposition (ITAD) business, which includes personal computer and mobility asset disposition, in the United States and in most other countries in which the business operates. Past results for this business segment have been included as part of the global components business. The company says it began the process of making its employees aware of the decision beginning July 15. Arrow also has proposed closing this business in Sweden, Belgium and the United Kingdom and says it will start the consultative process with employees' representatives.

Don't think this will not happen again, when companies are losing money, they cut as much as they can before just going out of business or closing a division down. Some this will happen slowly others will just stop doing business without warning!



## How do you Validate Profitability?

- Request **Audited** financials that demonstrate the complete income statement and balance sheet directly from your ITAD's accountants.
- Are they profitable? If not then DO NOT do business with them!
- **Profitability indicates stability and long-term viability!**



Audited Financial Report	vs	Unaudited Financial Report
Certified Public Accountant	Process	Internally by Companies
Income Cash flow Balance sheet	Contain's	Income Cash flow Balance sheet
Yes	Accuracy	Uncertain
Yes	Assurance	No
consumes time and money	Time and money	Cost effective
Maximum transparency	Transparency	No



# What are the Signs your ITAD Vendor is in Financial Trouble

- Your average **costs** for ITAD per asset are **below \$35** per Laptop
- Your average **Sale Price** per Laptop is **below \$120** per Laptop
- Your average **Recovery** per Laptop is **below \$50** per Laptop
- Your average Recovery per Laptop has **declined beyond 2019**
- Your assets of value (Laptops, Desktops, Servers, Smart Phones, Tablets, Networking, Storage) **NOT being sold, and being Recycled**
- Your Vendor NOT having Audited or Reviewed financials by outside accounting firm
- Your Vendor Showing **Losses before 2019, during Covid after Covid**
- **Certifications** are not evidence of financial stability



# At risk with your Primary & Secondary ITAD Vendor?

RISK

VS.

REWARD



What path should I choose? You can choose to have a 2<sup>nd</sup> or 3<sup>rd</sup> ITAD Vendor!

They all look the same, don't they?





**We can not solve our problems with  
the same level of thinking that  
created them**

**- Albert Einstein**

Let me  
show you  
your  
Plan B



Lifecycle ITAD Partner  
with Premium Value  
Added Recovery  
through 1<sup>st</sup> World  
Retail Channels  
providing 2x+ then  
selling to 3<sup>rd</sup> World  
Countries Wholesale



## Premium Value-Add Recovery Starts with being MAR Authorized

If your ITAD Vendor is NOT a MAR and is NOT adding Windows OS legally to your valuable Laptops you are missing out on significant recovery. The upside difference averages \$100 per 6-year-old laptop.

**Without being a MAR you CANNOT sell your PC's legally with an OS and you miss out selling through the Premium Retailers!**

**Microsoft**<sup>®</sup>  
**AUTHORIZED**  
*Refurbisher*



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# Is your ITAD Partner MAR-certified?

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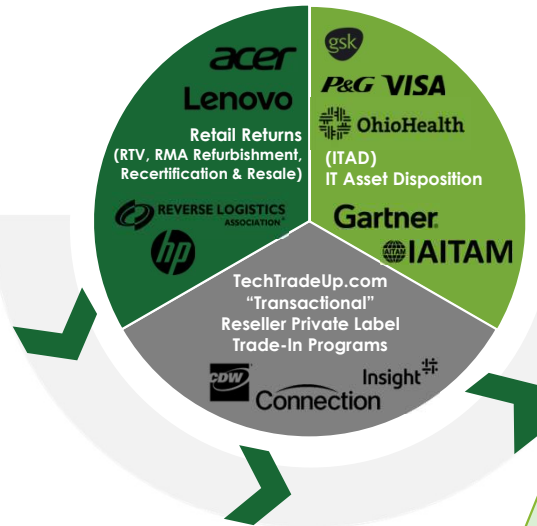
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**Microsoft**<sup>®</sup>  
**AUTHORIZED**  
*Refurbisher*

Plan-IT-ROI

# PlanITROI's Secure Purpose-Driven Platform Creates Profitable ITAD Programs

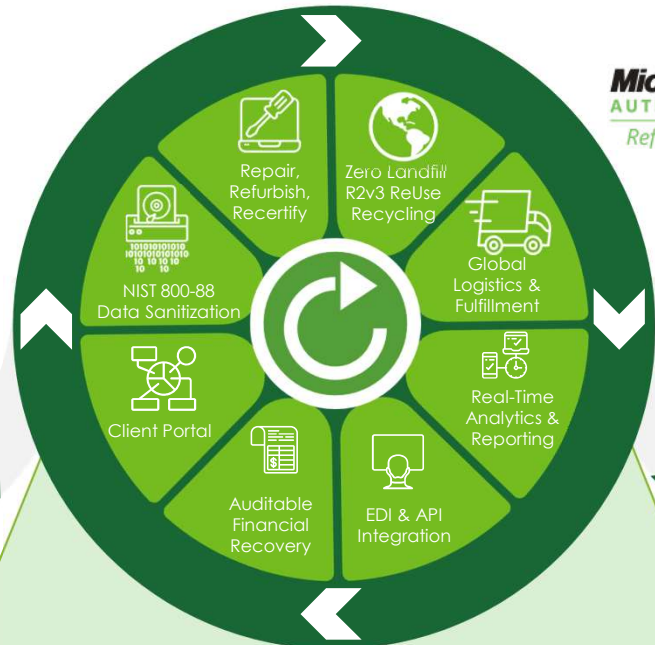
## First User "Client" Supply Channels



## Direct to the Second User B2C/D2D "Customer" Sales Channels



Affordable technology for all with POS/POU reporting



## Device lifecycle management driven by Plan·IT·vision

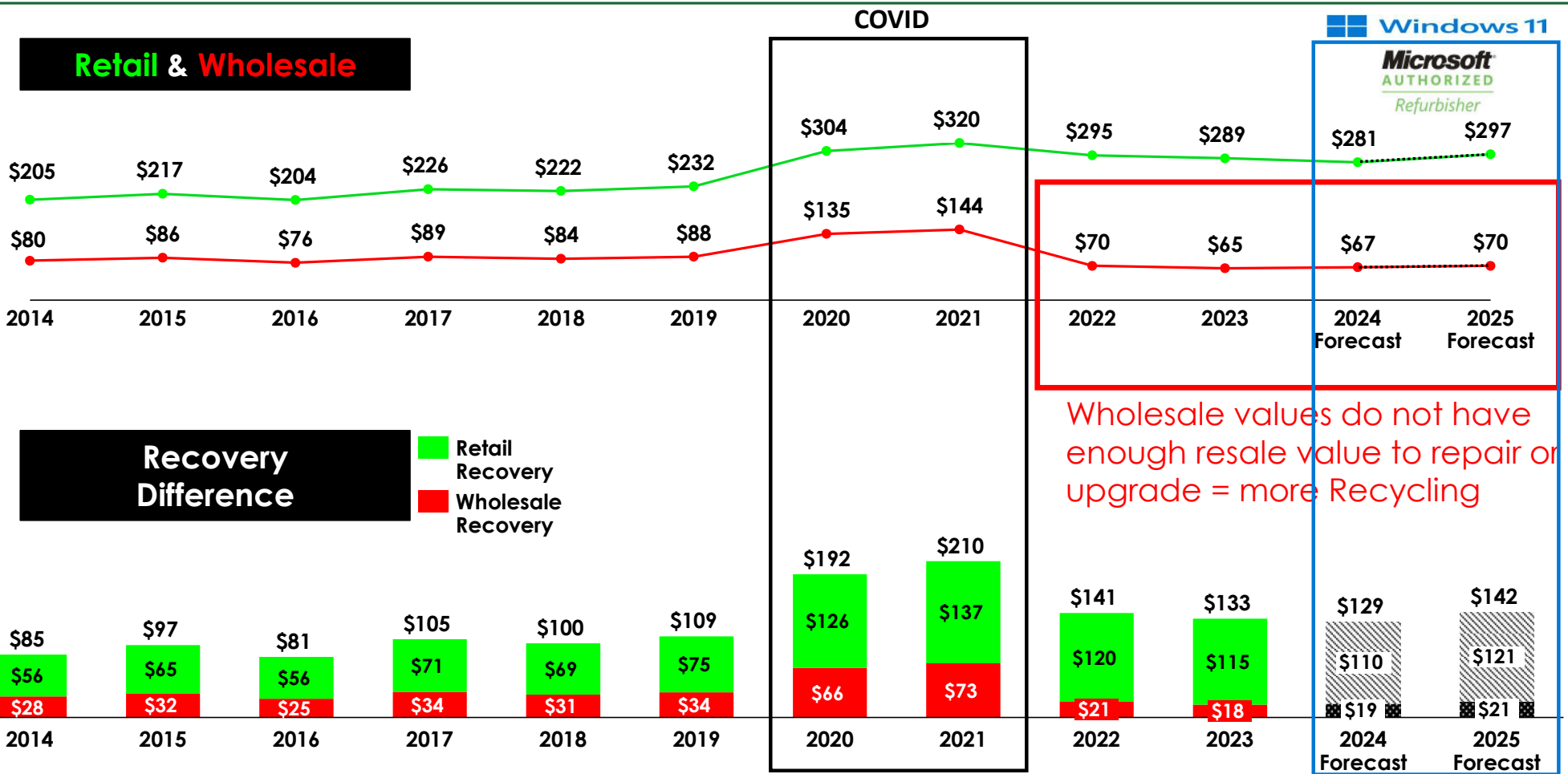
The PlanITvision platform integrates with global partners helping manage client assets by delivering 24/7 real-time data, essential features like data sanitization, CODD reporting, ESG reporting, and comprehensive analytics, spanning the entire asset lifecycle from collection to disposition with integration into ServiceNow.



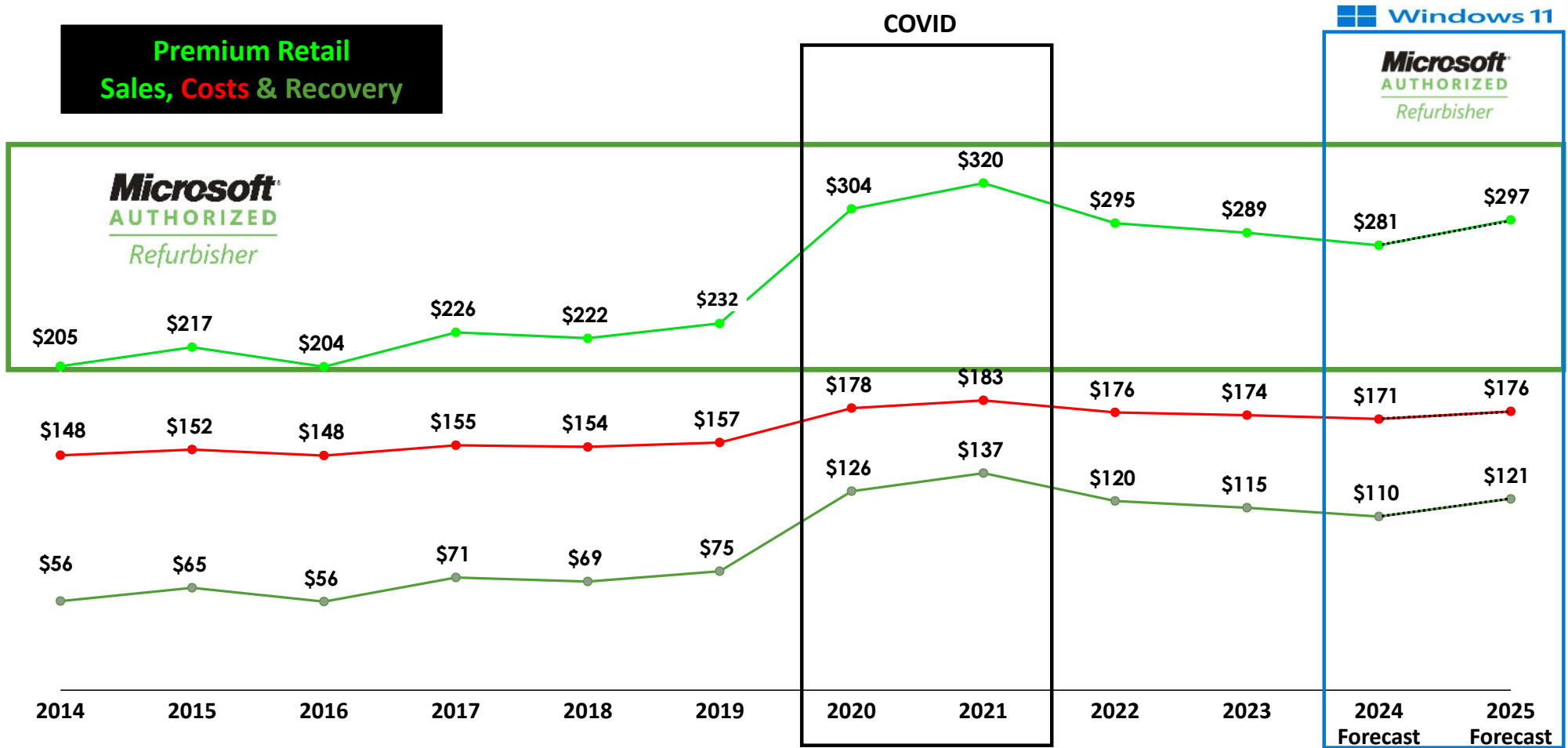
- 100% fully transparent approach to IT asset disposition and reverse logistics
- 100% Data Destruction Guarantee
- NIST 800-88 Standards Compliance
- Certified to NAID AAA
- ISO 27001 Certification
- CODD Reporting Integrated with ServiceNow

- Devices are refurbished and/or recertified then sold to the next user B2C/D2C through retailers, resellers, direct or special interest organizations with an industry-leading 18-month warranty and support.
- Revenue share clients receive "impact maps" showing low-income communities and families that rely on our affordable technology.
- We address 38 Million Low Income Americans with: Affordable Connectivity Program, BEAD Funding & ConnectHomeUSA (HUD).

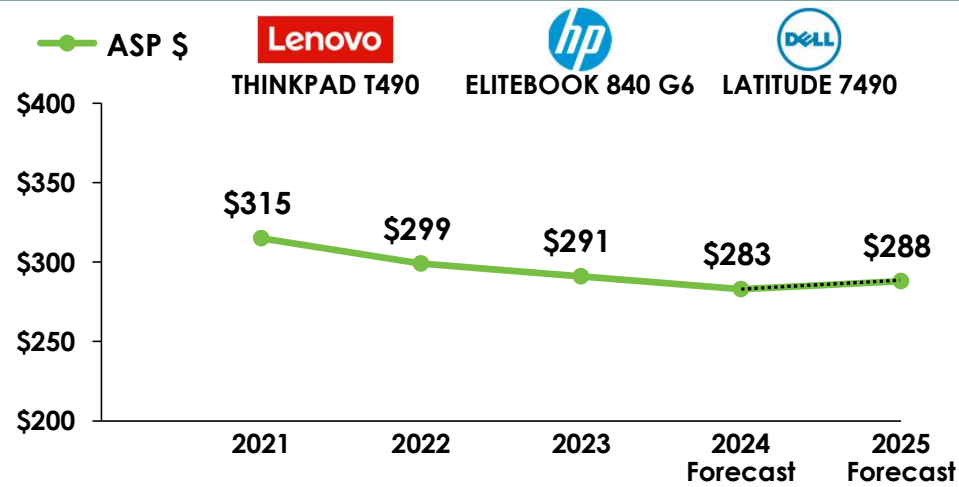
# PlanITROI Historical Retail & Industry Wholesale Sale Prices and Recovery to a Client



# PlanITROI Historical Retail 6Yr Old Laptop Average: Sale Prices and Recovery



# PlanITROI is a Best Buy \* Key Supplier for 10+ Years \* Refurbished Recertified



Manufacturer	Lenovo	hp	DELL
Model	THINKPAD T490	ELITEBOOK 840 G6	LATITUDE 7490
Release Year	2019	2017	2018
ASP \$ (2021 - 2025 F)	\$269	\$297	\$253
Specifications	Intel® Core™ i5 / 16GB DDR3 / HDD -256 GB	Intel® Core™ i5 / 16GB DDR3 / HDD -256 GB	Intel® Core™ i5 / 16GB DDR3 / HDD -256 GB



**HP Elitebook 840 G6 Laptop, Intel I5-8365U 1.6GHZ, 16GB RAM, 256GB SSD HD W10P-64 - Refurbished - Silver**  
 Model: 840G6.i5.16.256 SKU: 6567255

**\$296.99** 4 payments starting at **\$74.25** with **ZIP**  
[Learn more >](#)  
 3 free months of Apple TV+ & 5 more  
**Hot offer** You're going to need Word, Excel, and PowerPoint  
 Protect your computer **★★★★★** (9366)

[LINK](#)



**Dell Latitude 7490 Intel I5-8350U 1.7GHZ, 16GB RAM, 256GB SSD HD, Webcam, W10P-64 - Refurbished - Black**  
 Model: 7490.i5.16.256 SKU: 6567250

**\$291.49** 4 payments starting at **\$72.87** with **ZIP**  
[Learn more >](#)  
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**Hot offer** You're going to need Word, Excel, and PowerPoint

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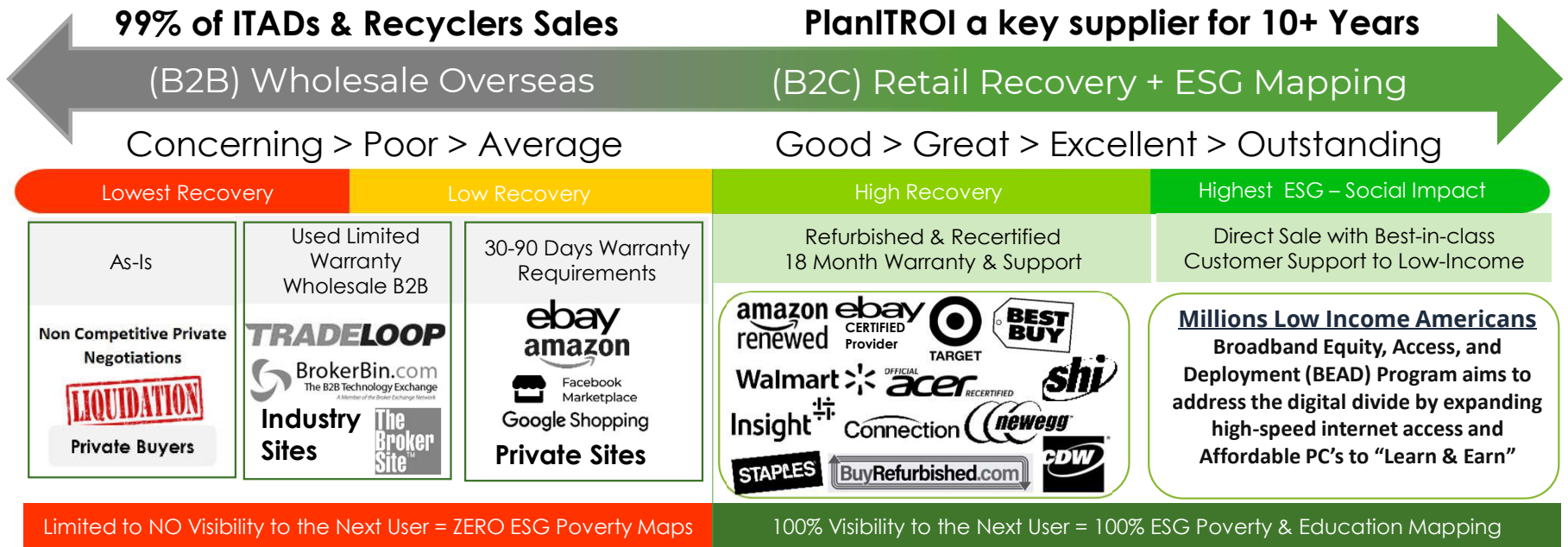


## **Your Plan B:** Partner with Premium Resale Market, Long Term ITAD Commitment & Strong Financial Balance Sheet

- **Premium Resale & Recovery** on 90%+ of your value assets (Laptops, Desktops, Smart Phones, Tablets, Any Apple, Servers). Demonstrated for 10+ Years as a Key Supplier
- **Positive Cash Flow**, capable of paying out revenue share, make payments without stress, and charges for Value Added Services.
- **YoY Growth**, demonstrated growth in adding new customers & profits. Diversified Business.
- **Downstream**, Less than 10% Recycling and Key Supplier Retail Channels with visible recovery you see by serial number.

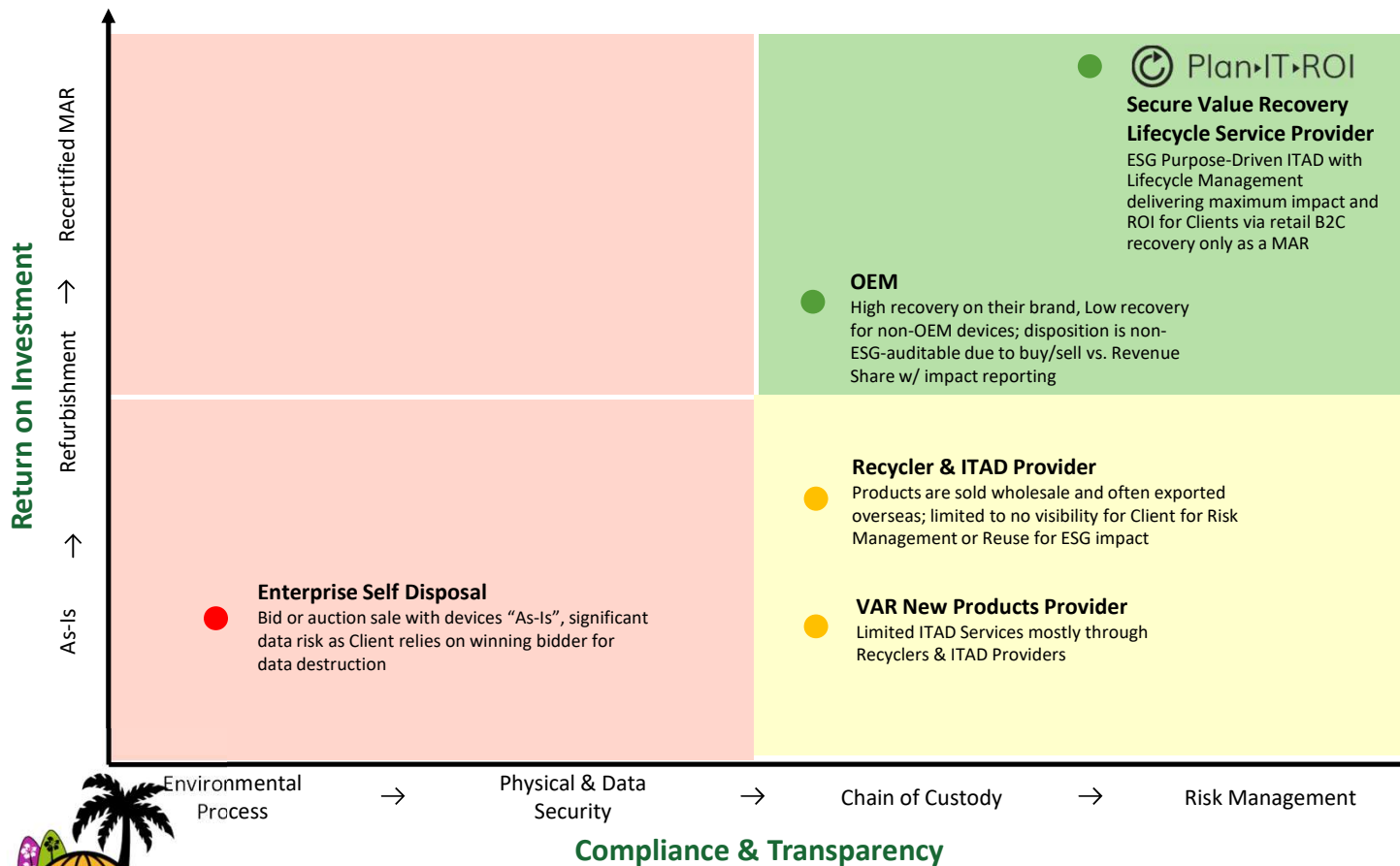


# Recovery Hierarchy and Markets for ITAD Computing Asset – Where do yours go?





# ITAD Provider Landscape according to...



## Key Highlights

- Highly fragmented market with a range of large, global and regional players, including a mix of ITAD specialists, electronics recyclers, value-added resellers and OEM's that self-perform their reverse logistics
- While many providers can offer the necessary data security and compliance qualifications to manage IT asset disposition, PlanITROI is uniquely capable of delivering regulatory compliance, complete transparency and the highest value recovery
  - Full service offering with a 100% secure chain of custody
  - Tracked in real-time with 100% transparency for the Client
  - Value-added "B2C Recertified" model
  - Mission-driven focus helps Clients hit measurable ESG and CSR targets that shareholders and consumers now expect



# What is Gartner saying about PlanITROI

- Gartner® Market Guide lists PlanITROI as the leader in **most preferred** and **additive value** full ESG life-cycle Haas:

**Gartner.**

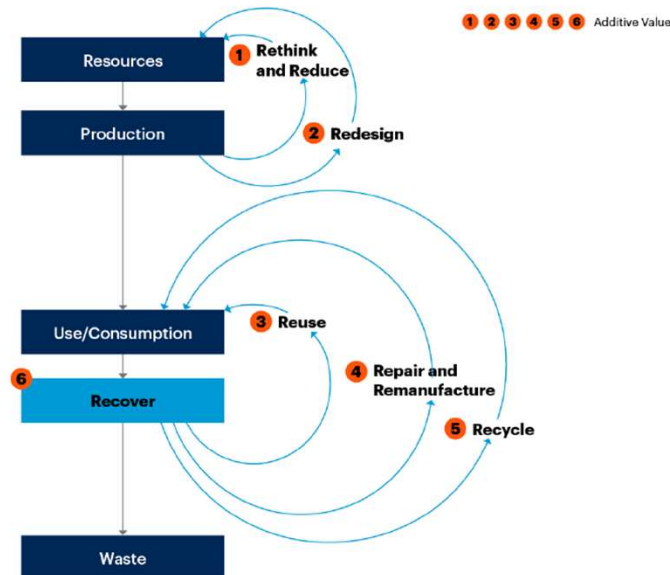
## PlanITROI

Privately held PlanITROI was founded in 2001. It is headquartered in New Jersey, where its single, 50,000 sf processing facility is certified to R2 v.3, NAID AAA, ISO 9001, ISO 14001, ISO 27001 and ISO 45001 standards. PlanITROI has about 200 direct, ITAD-specific employees and approximately 280 customers that generate about \$70 million to \$80 million in revenue (Gartner estimate). About 75% of this revenue is from North America, with 17% from EMEA and 8% from APAC. Although PlanITROI has a single owned-and-operated facility in New Jersey, it can deliver ITAD services globally through its 30 certified partners in about 90 countries. It audits its partners and downstream vendors twice annually (one scheduled, one surprise).

A perennial challenge for many organizations is real-time, global access to their ITAD shipment/processing data. PlanITROI's internally developed PlanITvision asset management system and portal is integrated into its partners globally (as well as ServiceNow), giving clients close to real-time access to a single source of their data.

PlanITROI's circular economy focus is on the more effective reuse of IT assets, and it states that it remarkets 90% of received assets. For example, its [Asset Retrieval Box Program](#) leverages PlanITvision's secure chain of custody to retrieve, refurbish and redeploy remote assets for internal reuse or external reuse (via resale).

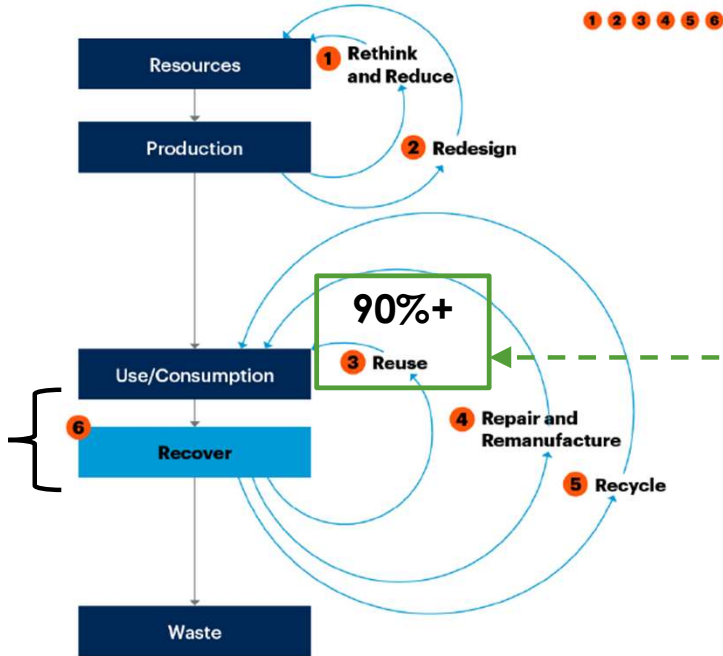
## Circular Economies and Additive Value



Gartner

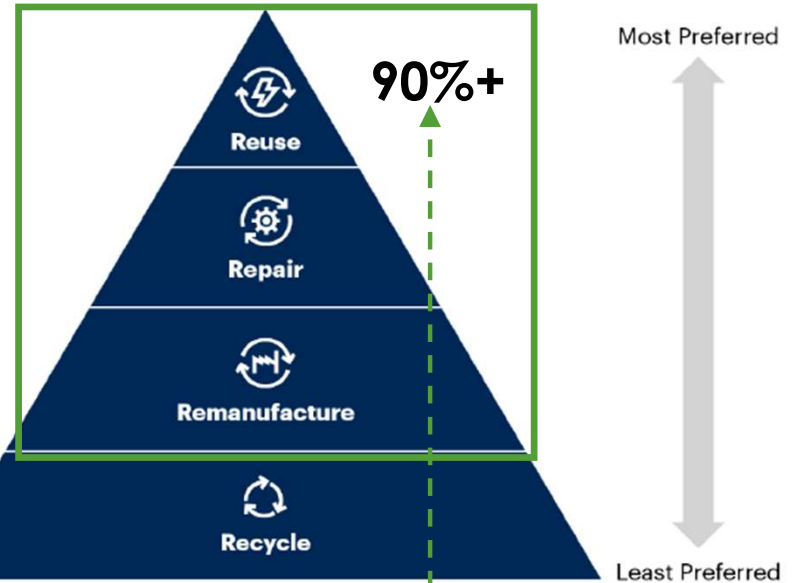
# Gartner recognizes PlanITROI as most Impactful Reuse within ITAD Industry

## Circular Economies and Additive Value



Source: Gartner  
762293\_C

## Device Waste Hierarchy



Source:  
76085

**PlanITROI Program is 90%+ Reuse Premium Retail Resale to the next User touching on 6 ESG Goals**



# Competitors' Focus on bottom of "Device Waste Hierarchy"

**Gartner**

## Market Guide for IT Asset Disposition

Published 23 January 2023 - ID G00740726 - 39 min read

By Analyst(s): Rob Schafer, Christopher Dixon

Initiatives: [IT Vendor Ecosystems Management](#)

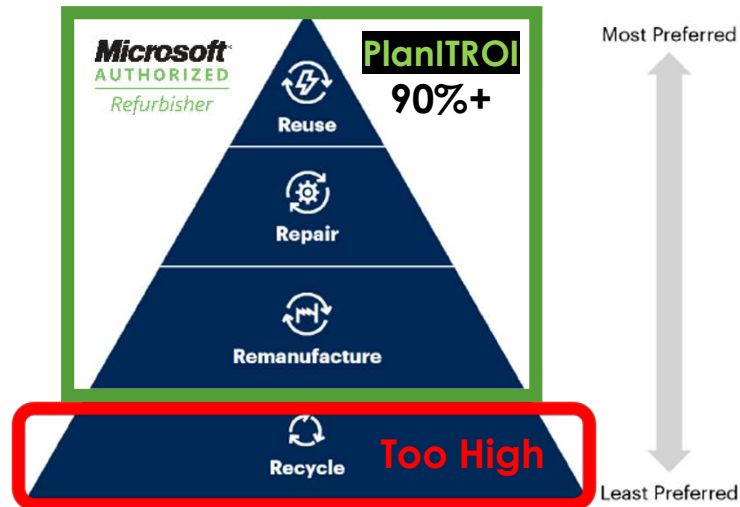
Sustainability requirements are compounding the ongoing ITAD challenges of data security and sound reuse/recycling. Sourcing, procurement and vendor management leaders can use this Market Guide to navigate the ITAD market, assess growing compliance risks and identify representative ITAD providers.

### Overview

#### Key Findings

- IT asset disposition (ITAD) processes and service providers are gaining CxO attention as the circular economy, particularly *reuse* of IT assets and components, helps mitigate Scope 3 emissions and attain sustainability/e-waste targets.
- IT asset managers who manage ITAD continue to struggle with the two material categories of ITAD risk: lax data security (inconsistent or inadequate data sanitization of all data-bearing assets) and improper environmental recycling.
- Too often, organizations don't pay adequate attention to which ITAD services are most efficiently handled internally and which are best executed by an external ITAD service provider.
- The rapid growth of mobile and "smart" devices, along with the exploding volume and variety of connected Internet of Things (IoT) devices, is forcing a reevaluation of traditional ITAD processes by both users and providers alike.

### Device Waste Hierarchy



Source: Gartner  
760873\_C

<b>Recycling Competitors</b>
OEMs: Dell, Lenovo, HP, Apple all outsource to...
<b>Apto Solutions</b>
<b>Cascade Asset Management</b>
<b>CentricsIT</b>
<b>CNE Direct</b>
<b>CXtec</b>
<b>Dynamic Lifecycle Innovations</b>
<b>ERI</b>
<b>Ingram Micro ITAD</b>
<b>Iron Mountain</b>
<b>Sage Sustainable Electronics</b>
<b>Sims Lifecycle Services</b>
<b>Sprout</b>
<b>TES</b>
<b>Wisetek</b>

So given the choice between a Purpose Driven Premium Retail ITAD Partner and a OEM or Recycler acting who would you choose as your partner?



## Conclusion: How to Avoid Major Risks Waiting below the surface

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Choosing a ITAD Partner with Premium Retail B2C/D2C in their DNA will provide:

**Highest Recoveries** leading to **High Performing** ITAD program ensuring your PC assets are with MAR Microsoft OS sold legally as affordable technology to consumers & business.

Lower **Data Security Risks** due to your ITAD partner being profitable with 100% transparency to all resale values, costs and reporting by serial number with CoDD ServiceNow verification.

Real **UN & EPA ESG measurements** that can be used in your reporting to your executives.



Plan▶IT▶ROI

# Thank you

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