

THE FIELD EQUIPMENT PROBLEM

Why Spreadsheets Are Costing Manufacturers Revenue, Compliance, and Control

A practical guide for Field Operations, Sales, and Compliance leaders managing equipment loans, rentals, demos, and trials in regulated and high-value industries.

Introduction

Every year, manufacturers in regulated and high-value industries send millions of dollars in equipment into the field. Demos. Loaners. Rentals. Trial units. Evaluation samples. Equipment that is central to the sales process, the customer relationship, and in many cases, the regulatory obligations of the business.

And in most cases, the system managing all of it is a spreadsheet.

This is not a criticism. Spreadsheets are where field equipment programs start because they work. At first, it works. They are flexible, familiar, and free. When your program is small and your team is tight, a shared Excel file is manageable.

But field equipment programs grow. Product lines expand. Field teams get larger. Customer demands increase. Regulatory requirements tighten. And the spreadsheet that once tracked 50 units across 10 reps suddenly needs to manage 500 units across 50 territories, integrated with Salesforce CRM, with compliance records that an auditor may ask to review at any time.

At that point, the spreadsheet stops being a management tool and starts being a liability.

This whitepaper examines four dimensions of that liability. This whitepaper makes the case for a better approach. Here's what we cover:

- The hidden compliance and audit risk sitting inside most equipment loan programs
- The revenue and ROI your organisation is leaving in the field
- The operational reality of managing high-value equipment at scale on spreadsheets
- Why Salesforce-native equipment management changes the picture entirely

Section 1: The Hidden Risk in Your Demo Program

Of all the problems that spreadsheet-based equipment management creates, the compliance risk is the one that keeps operations and regulatory leaders awake at night. The problem with compliance risk is that it stays invisible right up until it isn't.

Here's a scenario that plays out in real organizations every year.

The Recall Scenario

A recall notice goes out for a specific model of device. The affected serial number range is published. Your organisation needs to locate every unit of that device currently on loan, on demo, or in evaluation with a customer. They need that answer fast.

In an organisation with a properly governed field equipment program, this takes minutes. You run a query. You know exactly which units are in the affected range. You know where each one is, who has it, when it was placed, and who the contact is. You initiate retrieval.

In an organization managing that equipment on spreadsheets, this takes days. You pull together files from multiple reps. You discover conflicting versions. Some units were moved without the spreadsheet being updated. Two reps have the same unit listed. One has left the company and the handover was incomplete. You are spending the first 48 hours of a recall event just trying to understand what you have and where it is.

That's not a hypothetical. That's what happens when there's no governed system in place.

Chain of Custody: What It Actually Means

Chain of custody in the context of demo and loaner equipment means being able to answer, for any unit in your program:

- Where is this unit right now, and who has custody of it?
- Where has this unit been, and in what sequence?
- Who authorised each transfer or placement?
- What condition was the unit in at each handover point?
- Has this unit been serviced, calibrated, or modified since leaving the facility?
- When is this unit due to be returned, and is it overdue?

A spreadsheet can capture some of these data points, some of the time, for some units. But it cannot enforce the process that ensures they are captured consistently, completely, and accurately across every unit, every rep, and every customer interaction.

A Salesforce-native equipment management system can. Every movement is logged automatically. Every transfer requires a record. Every unit has a complete, auditable history from the moment it enters the program to the moment it is retired or sold.

The Audit Reality

FDA inspections of medical device manufacturers increasingly include questions about demo and loaner equipment programs. Inspectors understand that equipment in the field, particularly high-value, patient-adjacent devices, carries real risk when not properly tracked.

The FDA expects manufacturers to be able to account for every device in the field, including demo and loaner equipment, as part of their Quality Management System obligations under 21 CFR Part 820.

For Class II and Class III medical devices, the ability to produce complete chain-of-custody records for field equipment is not optional. That's a regulatory requirement, not a best practice.

Common audit findings related to field equipment management include:

- Inability to produce complete location records for devices in the field
- No documented process for tracking device condition at placement and return
- Missing or inconsistent serialization records for loaner units
- No evidence of calibration or maintenance compliance for equipment on extended loan
- Inadequate recall notification procedures for field equipment

Each of these findings can result in a Form 483 observation. Repeated or serious findings escalate to warning letters and enforcement action.

The cost of getting this wrong is not just regulatory. It is operational, reputational, and in a recall scenario, potentially clinical.

Beyond Medical Devices

While the FDA compliance context is specific to medical devices, the chain-of-custody challenge extends to any regulated or high-value equipment program. Life sciences and laboratory equipment manufacturers face similar audit obligations. Industrial and scientific instrument companies manage equipment trials worth hundreds of thousands of dollars per unit. Across all of them, the question is the same: if something goes wrong, can you account for every unit in the field?

The ones that can answer yes have already replaced the spreadsheet with a governed, auditable system.

Key questions to ask your team today:

- ▶ How long would it take to locate every unit of a specific model currently on loan in the field?
- ▶ Do you have complete chain-of-custody records for every unit placed in the last 12 months?
- ▶ If an auditor asked for the placement and return history of a specific serial number, could you produce it today?
- ▶ Is your current equipment tracking process documented as part of your Quality Management System?

Section 2: The Revenue You Are Leaving in the Field

Compliance is the risk that makes the business case urgent. But the revenue story is what makes it compelling.

Most organizations with large field equipment programs know that their demo and loaner assets are significant. They know what they spent to acquire the equipment. They know, roughly, how many units are out in the field. What they almost never know. What almost no one knows with any precision is what those units are actually delivering in return.

The Visibility Gap

A spreadsheet-based program typically tells you:

- How many units went out
- Where they were sent (if the spreadsheet is up to date)
- When they are due back (if the rep remembered to log it)

What it almost never tells you:

- Which units are actively being evaluated versus sitting unused
- Which demos are converting to closed deals and at what rate
- Which reps have equipment that has not moved in 30, 60, or 90 days
- What the average time from demo placement to purchase decision is
- Which accounts have had equipment for six months with no follow-up
- What your total fleet utilization rate actually is

The gap between what you know and what you need to know represents real revenue that is being lost, delayed, or left unaccounted for.

The Idle Equipment Problem

Across medical device and high-value equipment manufacturers, the same pattern keeps emerging: a significant portion of demo and loaner equipment in the field at any given time is not actively contributing to the sales process.

Some are sitting in a rep's car. Some are at an account that made a purchasing decision six months ago and nobody went back for the unit. Some are with a distributor whose customer has since moved on. Some was transferred between accounts with no paperwork trail.

Equipment that is not actively being evaluated is not generating revenue. It is also depreciating, risking damage, and consuming the working capital that could have been deployed in a higher-potential opportunity.

Consider this: if 20% of your demo fleet is idle at any given time, and your fleet is worth \$10 million, that is \$2 million in equipment that is generating no return.

Recovering half of that utilization by getting that equipment into active evaluations could have a material impact on pipeline and conversion rate.

You cannot recover utilization you cannot see.

Conversion Intelligence

The second revenue problem is conversion visibility. Most field equipment programs can tell you that a demo was placed. Very few can tell you what happened to it.

Did the customer buy? Did they pass? Did the opportunity go dark? Was there a follow-up? Is the equipment still there while the opportunity sits in a pipeline that has not been updated in four months?

When equipment management is connected to Salesforce CRM natively, every equipment event is linked to an account, an opportunity, and a rep. You can see exactly which demos are converting, which are stalling, and where in the sales process the equipment is supporting a decision. You can identify the reps with the highest demo-to-close rates and understand what they are doing differently. You can see which products convert fastest and which need more sales support.

This isn't reporting for its own sake. It's the intelligence that drives a smarter, more productive field equipment program.

The Cost of Not Knowing

Beyond the revenue opportunity, there is a direct cost to operating a field equipment program without visibility. Consider the hours spent each week:

- Field reps manually updating spreadsheets instead of selling

- Operations managers chasing reps to find out where equipment is
- Finance teams manually reconciling equipment lists for asset reporting
- Service teams unable to confirm which unit a customer has when they call in an issue
- Leadership teams receiving utilization reports that nobody is confident are accurate

Across a field team of any real size, those hours add up fast. That is on top of the revenue impact.

Section 3: When Spreadsheets Stop Scaling

There's no judgment in starting with a spreadsheet. It's the rational choice for an early-stage program. The question is not whether to start with spreadsheets. The real question is knowing when you've outgrown them.

The warning signs tend to be gradual, and then suddenly unavoidable.

The Five Failure Modes

1. Version Control Breaks Down

The equipment spreadsheet starts as one file. Then a second rep needs to update it from a different location. Then someone emails a copy to finance. Then someone else saves a local version because the shared drive was slow. Within six months there are four versions of the spreadsheet and nobody is certain which one is current.

When version control breaks down, data integrity follows. Units appear in multiple locations. Return dates are missed. Equipment is ordered that is already available in the field. Decisions are made on information that is weeks out of date.

2. Process Compliance Becomes Unenforceable

A spreadsheet can record information. It cannot enforce the process. It cannot require a rep to log a placement before they leave the customer site. It cannot prevent a unit from being transferred without documentation. It cannot alert a manager when equipment has been with a customer for longer than the agreed loan period.

In a small team with strong discipline, this is manageable. In a larger field organisation, process compliance degrades over time until the spreadsheet reflects what people remembered to log rather than what actually happened.

3. Integration With CRM Becomes Manual

Equipment demos and loans are sales activities. They should be connected to the accounts, opportunities, and contacts in your CRM. In a spreadsheet-based program, that connection is manual at best: someone periodically cross-referencing the equipment list against Salesforce and updating notes.

In practice, this means that the rep who manages their CRM and the person who manages the equipment spreadsheet are operating with incomplete pictures of the same reality. Opportunities sit in Salesforce without any record of the demo status. Equipment sits in the field with no link to the opportunity it is supposed to be supporting.

4. Reporting Requires Heroic Effort

When leadership asks for a utilization report, someone has to build it. They pull the spreadsheet, cross-reference with Salesforce, call a few reps to verify current locations, and produce a report that took half a day to assemble and is already partially out of date by the time it is presented.

This is not a data problem. It is a systems problem. The data exists. It is scattered across multiple sources, in multiple formats, maintained by multiple people with varying levels of discipline.

5. Exceptions Become Incidents

In a well-governed equipment program, exceptions like overdue returns, missing units, condition disputes, and compliance questions are handled by a defined process. In a spreadsheet-based program, they become incidents. Someone notices something is wrong. A flurry of emails follows. People are pulled off other work. Eventually the situation is resolved, at a cost in time and stress that nobody formally accounts for.

Over time, these incidents accumulate. The field equipment program develops a reputation as a source of operational friction rather than a sales asset.

The five failure modes of spreadsheet-based equipment management:

- ▶ Version control breaks down: multiple files, conflicting data, no single source of truth
- ▶ Process compliance degrades: you can record, but you cannot enforce
- ▶ CRM integration is manual: equipment activity is disconnected from sales activity
- ▶ Reporting requires heroic effort: data is scattered, assembly is manual
- ▶ Exceptions become incidents: problems surface as crises rather than being caught early

The Tipping Point

The tipping point is different for every organisation. Some reach it at 100 units in the field. Some manage to hold on until they have 1,000. But in our experience working with field equipment programs across medical devices, life sciences, and industrial equipment, the tipping point is almost always reached before the organisation recognises it has arrived.

The signal is usually one of three things: a compliance scare that exposes how little visibility the organisation actually has, a revenue conversation where nobody can produce credible

utilization data, or an operational incident that cascades into something more serious than it should have been.

The organizations that get ahead of it put a governed system in place before the crisis forces the issue. The ones that wait do it after.

Section 4: The Salesforce Advantage

Equipment tracking software isn't hard to find. Asset management tools, rental management platforms, inventory systems. The category is well-served. So the question is not whether a purpose-built system is better than a spreadsheet. It clearly is the better option.

The question is whether a standalone equipment tracking tool is the right answer, or whether native integration with the platform your business already runs on changes the calculation entirely.

We think it does. Here's why.

One Platform, One Source of Truth

Adding a standalone equipment tracking tool to a Salesforce organisation creates a second system of record for information that belongs in the first one. That's a problem that compounds over time.

Your accounts are in Salesforce. Your opportunities are in Salesforce. Your contacts, your cases, your service records, your pipeline. All of it is in Salesforce. Your team already lives in Salesforce every day.

When you track equipment in a separate system, every insight that connects equipment activity to sales activity requires an integration, a manual export, or someone to reconcile two data sources. The connection between a demo placement and an opportunity is a custom field in two separate systems rather than a native relationship in one.

Equipment Track is built natively on Salesforce, which means equipment records, loan agreements, rental contracts, and demo placements are first-class objects inside the same platform as your accounts and opportunities. There is no integration to build and maintain. There is no second login. There is no data reconciliation.

The Connected Intelligence Advantage

When equipment activity and sales activity live in the same platform, something powerful becomes possible: connected intelligence.

- A sales rep can see the complete equipment history for an account before they walk in the door: what has been placed, what has been returned, what converted, what didn't
- A manager can see a dashboard showing demo placements alongside pipeline stage, identifying opportunities where equipment has been placed but the deal has stalled

- Operations can trigger automated alerts when equipment has been with a customer past the agreed loan period, linked directly to the account owner in Salesforce
- Finance can run utilization and asset value reports using the same reporting tools the business already knows, without a separate BI layer
- Service teams can pull up the complete equipment history for a customer when they call in a support issue, including which specific unit they have and its service record

None of this requires custom development or complex integration. That's the natural result of having equipment management and CRM in the same platform.

Compliance Built Into the Platform

For regulated industries, Salesforce's native capabilities add a compliance layer that standalone equipment tools cannot easily replicate.

Salesforce's field history tracking provides automatic, tamper-evident audit logs for every change to an equipment record. The platform's role-based security model ensures that the right people have access to the right records without complex permission management. Workflow rules and process automation enforce the compliance steps: requiring sign-off before a unit ships, generating a return reminder before an overdue date, escalating a compliance exception to a manager automatically.

This is not a feature list. It is the architecture of a governed equipment program built on enterprise infrastructure, the same infrastructure that some of the world's most regulated industries already trust for their most sensitive business data.

Deployment Without Disruption

The most common concern we hear from organizations thinking about moving off spreadsheets is the implementation burden. A new system means a migration, a configuration project, a training programme, and a period of disruption.

Because Equipment Track is native to Salesforce, the deployment story is different. Your team already knows the platform. The data model fits within the Salesforce architecture your organisation has already approved and configured. There is no new infrastructure, no middleware, no parallel system to run during a transition period.

For most organizations, moving from spreadsheet to Equipment Track is a configuration project, not a transformation programme. The question isn't whether your team can absorb the change. It's whether you can afford not to make it.

Section 5: What Best Practice Looks Like

Theory is useful. Experience is better. Equipment Track has been deployed in some of the most demanding field equipment environments in the medical device industry, and what we have learned from those deployments informs everything in this whitepaper.

Here is what best practice looks like in organizations that have solved the field equipment problem.

GE Healthcare

Industry: Medical Devices | **Use Case:** Demo and Loaner Equipment Management

GE Healthcare is one of the world's largest medical technology companies, with a field equipment program operating at global scale. Managing demo and loaner equipment across a field organisation of this size requires a system that can handle volume, complexity, and the compliance requirements of a regulated medical device manufacturer.

Equipment Track provides GE Healthcare with real-time visibility over every unit in the field, complete chain-of-custody records for compliance purposes, and the utilization and conversion intelligence needed to run a high-performance demo program at scale. All natively within Salesforce.

Olympus

Industry: Medical Devices and Life Sciences | **Use Case:** Loaner and Trial Equipment

Olympus operates across medical, surgical, and life sciences divisions, with a loaner and trial equipment program that spans multiple product categories and customer types. The compliance requirements for surgical and endoscopy equipment place particular demands on chain-of-custody documentation and recall readiness.

Equipment Track gives Olympus the audit trail and serialization capability their compliance team requires, while connecting equipment activity directly to the sales and service data in Salesforce, giving their commercial team visibility they did not previously have.

What These Deployments Have in Common

Across all three organizations, and across the broader base of Equipment Track customers in medical devices, life sciences, and industrial equipment, several consistent patterns emerge from the deployments that deliver the most value:

Compliance first, commercial value follows

The organizations that get the most from Equipment Track typically start with the compliance use case: chain-of-custody, serialization, audit trail. They discover the commercial value once the data is in place. When every movement is logged and every unit is accounted for, the utilization and conversion intelligence becomes available as a by-product of good compliance practice.

Connected CRM data amplifies the value

The deployment value increases significantly when equipment records are actively connected to Salesforce accounts and opportunities. Organizations that use Equipment Track as a standalone tracking system get the compliance benefit. organizations that connect it fully to their Salesforce CRM data get the commercial intelligence benefit on top.

Process discipline is what separates good programs from great ones

Technology supports the process. It doesn't replace the need for organisational discipline. The organizations with the highest-performing equipment programs are the ones that have used Equipment Track to enforce a clear process, then held their field teams accountable to it. The system makes compliance visible. Prioritising it is still a leadership decision.

Section 6: Taking Action

If the themes in this whitepaper resonate, the question is where to start. Every field equipment program is different in its scale, its complexity, and its current maturity. But the path from spreadsheet to governed program follows a broadly consistent sequence.

Step 1: Assess Your Current State

Before investing in any new system, understand what you are actually dealing with. A quick self-assessment surfaces the gaps:

- How many units do you currently have in the field, and how confident are you in that number?
- Could you produce a complete chain-of-custody record for any specific unit within an hour?
- Do you know your current fleet utilization rate (the percentage of equipment actively in evaluation)?
- Do you know your demo-to-close conversion rate, and which reps are above and below average?
- Is your equipment tracking process documented as part of your Quality Management System?

If the honest answer to most of these is no, you have a clear picture of where your program currently sits and what a governed system needs to deliver.

Step 2: Define What Good Looks Like

The value of a governed equipment program isn't the technology itself. It's the outcomes the technology makes possible. Before selecting a system, define the outcomes you need:

- What compliance and audit capability does your regulatory team require?
- What visibility does your operations team need to manage utilization and returns?
- What intelligence does your commercial team need to connect equipment activity to sales outcomes?
- What reporting does finance need for asset management and depreciation purposes?

These outcomes, not feature lists, should drive your evaluation criteria.

Step 3: Evaluate the Salesforce-Native Option First

If your organisation runs Salesforce, evaluating a Salesforce-native solution before looking at standalone tools is simply the logical sequence. The integration and deployment advantages of staying within the platform you already operate are significant. The cost and complexity of maintaining a parallel system are real.

Equipment Track is available on the Salesforce AppExchange with a free trial. A working deployment can be evaluated in your own Salesforce environment before any commercial commitment is made.

Step 4: Start With Compliance, Build Toward Commercial Intelligence

For organizations in regulated industries, the compliance use case is the right starting point. Get the chain-of-custody records right. Get the serialization and audit trail in place. Establish the process discipline that ensures every unit movement is captured.

Once the compliance foundation is solid, the commercial intelligence layer follows naturally. Utilization reports. Conversion tracking. Rep performance dashboards. The data is already there. It just needs activating.

Conclusion

The field equipment problem is not new. Medical device manufacturers, life sciences companies, and industrial equipment leaders have been managing demos, loaners, rentals, and trials for decades. Spreadsheets have served as the default management tool for most of that time.

The context has changed.

Regulatory scrutiny of field equipment programs has increased. The financial scale of demo fleets has grown as product complexity and unit values have risen. The commercial pressure to demonstrate ROI on field equipment investment has intensified. And the availability of a purpose-built, Salesforce-native solution that addresses all three dimensions has removed the practical barriers to doing this properly.

Moving beyond the spreadsheet isn't primarily a technology decision. It's a risk decision, a revenue decision, and an operational decision that all point the same way.

The compliance risk of managing high-value, regulated equipment on spreadsheets is real and growing. The revenue that sits untracked in idle and underperforming demo programs is material. The operational cost of a system that cannot enforce process, integrate with CRM, or produce reliable reports at scale is significant.

Equipment Track was built to solve all three, natively on Salesforce, proven with some of the most demanding field equipment programs in regulated industries, and available to evaluate for free on the AppExchange today.

The organizations that lead in field equipment management are not the ones with the most sophisticated technology.

They are the ones that made a decision to govern their equipment program with the same rigour they apply to everything else. Then they chose a system that made it possible.

About Unaric Equipment Track

Equipment Track is a Salesforce-native solution for managing equipment loans, rentals, demos, and trials in regulated and high-value industries. Built on the Salesforce platform, Equipment Track provides complete chain-of-custody records, real-time field visibility, utilization and conversion intelligence, and recall readiness, without adding a system outside the platform your team already uses.

Trusted by GE Healthcare, Olympus, National Instruments, HuFriedyGroup, and organizations across medical devices, life sciences, and industrial equipment.

Try Equipment Track free on the Salesforce AppExchange: [View on AppExchange](#)

Learn more: unaric.com/unaric-equipment-track

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