Forklift Guidance:
Self-Assessment Worksheet

SYNAOS

Forklift Fleet Optimization Checklist: Where Do You Stand?

How to use: Use this checklist to evaluate your forklift operations by rating your current practices in each area. This will help you pinpoint where your operations can be optimized and serves as a starting point for to enhance your intralogistics efficiency.

Checklist:

1 **Forklift Utilization Analysis: How do you assess the utilization of your forklifts?**

- Do you conduct regular reviews of forklift performance? Are forklifts frequently under or over-utilized?
- How frequently do you adjust fleet size or redistribute workload/resources based on utilization data?
- Are there specific times when forklifts are congested or under demand pressure, affecting operational flow?
- Are decisions on maintenance and fleet size adjustments data-driven, or are they based on ad-hoc observations?
- How often is data presented in a way that's easy to interpret and actionable for your team?

> **Self-Assessment:**
> How confident are you that your current fleet matches your operational needs?
> 1 = Not confident at all, 5 = Completely confident
>
> **1** ☐ **2** ☐ **3** ☐ **4** ☐ **5** ☐

2 **Traffic Management: Is there a system in place to manage ALL traffic participants (forklifts, pedestrians, vehicles)?**

- Are there times when traffic flow is smooth, but suddenly gets congested?
- Is there conflict between manually driven forklifts and automated vehicles? Will this become an issue with incrasing automation?
- Are tasks often delayed due to blocked routes or forklifts waiting for others to clear the way?
- Have there been recent accidents involving forklifts?

> **Self-Assessment:** Rate your current traffic management (1 = very poor, 5 = excellent):
>
> **1** ☐ **2** ☐ **3** ☐ **4** ☐ **5** ☐

3 **Task Allocation and Planning: How are forklift tasks assigned?**

- Is there a system in place that matches the task to the most suitable forklift based on e.g. location, load type, or urgency?
- How often do drivers experience downtime waiting for their next task?
- Are high-priority tasks sometimes delayed because of poor visibility into which tasks are more critical?
- Is there a centralized system for prioritizing tasks based on deadlines, importance, or current load demand?

> **Self-Assessment:** Rate the effectiveness of your task allocation and prioritization (1 = very poor, 5 = excellent):
>
> **1** ☐ **2** ☐ **3** ☐ **4** ☐ **5** ☐

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4 **Task Prioritization: Do you have a clear system to prioritize tasks?**

- How do you decide which tasks are most important?
- How do you handle changes in priority when new, more urgent tasks come up?
- How are task priorities communicated to forklift operators? Is it clear and efficient?
- Are there instances where critical tasks are missed or delayed due to a lack of clear prioritization?

Self-Assessment: Rate how effectively your tasks are prioritized and managed to ensure timely completion of the most critical jobs (1 = very poor, 5 = excellent):

1 ☐ **2** ☐ **3** ☐ **4** ☐ **5** ☐

5 **IT Considerations: Does your current IT infrastructure align with your operational needs?**

- Is there a real-time information flow?
- How quickly can your IT infrastructure adapt to changes in operational parameters (e.g. new task allocations, priority adjustments)?
- Does your current system support high availability, or do you experience downtime when implementing updates or changes?
- Does your IT setup provide real-time visibility and data access from anywhere, or is it restricted by location or system limitations?

Self-Assessment: Rate how well your IT infrastructure supports the flexibility, speed, and scalability required for your forklift operations (1 = very poor, 5 = excellent):

1 ☐ **2** ☐ **3** ☐ **4** ☐ **5** ☐

Question 1:	Question 2:	Question 3:	Question 4:	Question 5:	Total points:
☐	☐	☐	☐	☐	☐ Points

Where do you stand?

Based on your self-assessment, use the following traffic light system to understand where your forklift operations stand and what actions you should consider:

Red = 5 - 12 Points: Your self-assessment indicates significant inefficiencies in your forklift operations. Critical areas require immediate attention to prevent safety risks, operational disruptions, and increased costs.

Orange = 13-19 Points: Your forklift operations are functioning reasonably well but show noticeable inefficiencies. Addressing these areas will enhance performance and reduce unnecessary costs.

Green = 20-25 Points: Your forklift operations seem to be well-organized and efficient. Have you thought about how to integrate manual material flows with automated systems in the future as your business changes? Will your current setup scale?

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