

Beverage Equipment Upgrade Readiness Checklist

A Working Assessment Tool for Convenience Store Operators, QSR Managers, and Multi-Site Facility Teams to Identify Which Equipment Would Benefit Most from an Upgrade

How to Use This Checklist

This tool helps you evaluate each piece of beverage equipment in your portfolio across four dimensions - guest experience, food safety, energy and water efficiency, and operational uptime - to identify which equipment has the most to gain from an upgrade and where upgrade investment delivers the strongest return. Complete one assessment per piece of equipment. Use the summary scoring in Part 2 to prioritize upgrade decisions across your portfolio and build the case for presenting upgrade investment to operations or finance leadership.

Complete assessments honestly based on current observed equipment condition and performance - not on what the equipment was capable of when new.

EQUIPMENT INFORMATION

Field	Details
Location / Site	
Equipment Type	☐ Soda Fountain Dispenser ☐ Hot Beverage / Coffee ☐ Ice Machine ☐ Frozen Beverage Machine
Manufacturer and Model	
Year Installed / Estimated Age	
Current Replacement Cost Estimate	\$
Last Major Service Date	
ENERGY STAR Rated	☐ Yes ☐ No ☐ Unknown

PART 1: FOUR-DIMENSION UPGRADE READINESS ASSESSMENT

Score each statement using the scale below. Be honest - the value of this assessment is in identifying real gaps, not confirming that aging equipment is performing well.

Scoring Scale

Score	Definition
3 - Fully Yes	This statement accurately describes the equipment's current performance
2 - Mostly Yes	This statement is mostly accurate with minor exceptions
1 - Mostly No	This statement is partially accurate but significant gaps exist
0 - No	This statement does not describe the equipment's current performance

DIMENSION 1: GUEST EXPERIENCE

How well does this equipment deliver a consistent, high-quality product that guests notice and return for?

Statement	Score (0-3)	Notes
The product this equipment produces is consistent from shift to shift - a customer who visits in the morning receives the same quality product as one who visits in the evening		
The product this equipment produces is consistent across locations - a customer at one location receives the same quality product as at another location in the portfolio		
The equipment maintains the correct product temperature or consistency throughout peak demand periods without requiring staff intervention or adjustment		
The equipment's food contact surfaces - nozzles, diffusers, brew baskets, barrel windows - appear clean and well-maintained from the customer's perspective at the start of every shift		

The equipment dispenses product smoothly and consistently without sputtering, sluggish flow, or irregular output that customers notice		
The equipment's appearance - exterior condition, display area, dispensing mechanism - is consistent with the brand standard the location is trying to present		
Customers rarely or never complain about product quality from this equipment - off-flavor, wrong temperature, wrong consistency, or product being unavailable		
Staff do not need to perform workarounds or manual adjustments between service periods to maintain acceptable product quality		

Dimension 1 Total: _____ / 24

Guest Experience Signal:

- 20-24: Equipment is delivering a strong guest experience. Upgrade priority is low on this dimension.
- 13-19: Equipment is delivering an acceptable but inconsistent guest experience. Upgrade would produce noticeable improvement.
- 8-12: Equipment is delivering a noticeably inconsistent guest experience. Guest experience impact of upgrade is significant.
- 0-7: Equipment is failing to deliver a consistent guest experience. Guest experience impact of upgrade is critical.

DIMENSION 2: FOOD SAFETY

How well does this equipment support safe food handling and meet current food safety standards?

Statement	Score (0-3)	Notes
The equipment's food contact surfaces have antimicrobial or food-safe surface treatments that are intact and functioning - not degraded by age or cleaning chemical exposure		
The equipment's drainage system prevents water from pooling in areas where microbial growth could occur between cleaning cycles		
The equipment has built-in cleaning cycle alerts or automated cleaning features that ensure cleaning occurs on schedule regardless of staff compliance		
Ice production surfaces - evaporator plates, water distribution components, bin liner - are free of visible mold, slime, or biofilm accumulation (<i>ice machines only - score 3 if not applicable</i>)		
Nozzles, diffusers, and product contact surfaces are designed for easy removal and cleaning - staff can complete required cleaning correctly without specialized tools or extensive training		
The equipment meets current FDA food safety standards for the product type it produces and dispenses		
Staff are able to maintain required cleaning intervals on this equipment during peak operating periods without it requiring service downtime		
There have been no food safety concerns, customer illness reports, or health inspection findings related to this equipment in the past 24 months		

Dimension 2 Total: _____ / 24

Food Safety Signal:

- 20-24: Equipment meets current food safety standards. Upgrade priority is low on this dimension.
- 13-19: Equipment has identifiable food safety gaps. Upgrade would improve food safety profile meaningfully.
- 8-12: Equipment has significant food safety concerns. Upgrade priority on this dimension is high.
- 0-7: Equipment presents serious food safety risk. Upgrade on this dimension is urgent.

DIMENSION 3: ENERGY AND WATER EFFICIENCY

How efficiently does this equipment consume energy and water relative to current standards?

Statement	Score (0-3)	Notes
This equipment carries an ENERGY STAR rating or meets current DOE minimum efficiency standards for its equipment type		
This equipment's energy consumption has not increased noticeably over the past two years without a corresponding increase in volume or operating hours		
For ice machines - this equipment produces its rated daily ice output without running continuously or struggling to keep pace with normal demand		
For refrigeration-dependent equipment - this equipment maintains target product temperature or consistency without extended compressor run cycles that indicate reduced efficiency		
This equipment does not generate noticeably more heat into the operating environment than when it was new - excess heat output indicates reduced refrigeration efficiency		
Water consumption for this equipment - where applicable - is within expected range for its rated capacity and current volume		
The heating elements in this equipment - where applicable - reach and maintain target temperature without extended warm-up cycles that indicate scale accumulation reducing efficiency		
Overall energy cost for this equipment has not been identified as above-normal relative to comparable equipment or industry benchmarks		

Dimension 3 Total: _____ / 24

Efficiency Signal:

- 20-24: Equipment is operating at acceptable efficiency. Upgrade priority is low on this dimension.
- 13-19: Equipment shows efficiency gaps that are generating avoidable operating cost. Upgrade would produce meaningful energy and water savings.
- 8-12: Equipment is operating significantly below current efficiency standards. Upgrade delivers substantial operating cost reduction.
- 0-7: Equipment efficiency is seriously degraded. Annual operating cost savings from upgrade are significant and should be quantified in the upgrade investment case.

DIMENSION 4: OPERATIONAL UPTIME AND RELIABILITY

How reliably does this equipment operate without service intervention, and how much management burden does it create?

Statement	Score (0-3)	Notes
This equipment has not required emergency service in the past 12 months		
This equipment has not been out of service during peak operating hours in the past 12 months		
Staff do not need to monitor this equipment closely during peak periods for signs of developing problems		
Service calls on this equipment are resolved in a single visit - technicians arrive with the right diagnosis and correct parts		
Parts for this equipment are readily available without extended lead times or special ordering		
This equipment performs reliably during the hottest months of the Southeast summer without requiring more frequent service or manual adjustments		

This equipment does not require staff to perform operational workarounds - reducing batch sizes, manually adjusting settings, skipping flavors - to maintain acceptable performance		
The management burden this equipment creates - monitoring, troubleshooting, coordinating service - is low relative to the revenue it generates		

Dimension 4 Total: _____ / 24

Uptime Signal:

- 20-24: Equipment is operating reliably with low management burden. Upgrade priority is low on this dimension.
- 13-19: Equipment is creating moderate management burden and reliability concerns. Upgrade would meaningfully reduce operational friction.
- 8-12: Equipment is creating significant management burden and reliability risk. Upgrade priority on this dimension is high.
- 0-7: Equipment is creating serious operational disruption. Upgrade on this dimension is urgent.

PART 2: UPGRADE READINESS SUMMARY

Overall Score Summary

Dimension	Maximum Score	Your Score	Percentage	Signal Level
1 - Guest Experience	24		%	
2 - Food Safety	24		%	
3 - Energy and Water Efficiency	24		%	
4 - Operational Uptime and Reliability	24		%	
Overall Total	96		%	

Overall Score Interpretation

Overall Score	Upgrade Readiness Level	Recommended Action
80-96 (83-100%)	Low readiness - equipment performing well across all dimensions	Continue planned maintenance. Reassess annually or when a significant service event changes the picture.
60-79 (63-82%)	Moderate readiness - meaningful gaps in one or more dimensions	Identify which dimensions are lowest scoring and evaluate upgrade options that address those specific gaps. Begin developing replacement cost estimate.
40-59 (42-62%)	High readiness - significant gaps across multiple dimensions	Upgrade investment is warranted. Proceed to building the financial case using TCO analysis and replacement justification. Prioritize pre-peak season if gaps affect summer performance.
Below 40 (under 42%)	Urgent readiness - equipment is failing across multiple dimensions	Upgrade is urgently needed. Equipment is creating guest experience, food safety, efficiency, and reliability problems simultaneously. Escalate to capital priority.

Critical Flags - Address Regardless of Overall Score

- Flag any equipment scoring 0 or 1 on any food safety statement for immediate review - food safety gaps cannot be deferred based on overall score.
- Flag any equipment that scored 0 on the statement about food safety concerns or health inspection findings - this requires immediate attention independent of other scores.
- Flag any equipment operating in a Southeast location that scored 0 or 1 on summer reliability - peak season performance failure is a revenue and brand risk that warrants urgent attention.

PART 3: PORTFOLIO UPGRADE PRIORITY SUMMARY

Complete one row per piece of equipment assessed. Use to compare upgrade readiness across the portfolio and prioritize upgrade investment where it delivers the most value. Add rows as needed.

Location	Equipment Type	Age	Guest Experience Score	Food Safety Score	Efficiency Score	Uptime Score	Overall Score	Overall %	Upgrade Priority	Est. Upgrade Cost
			/24	/24	/24	/24	/96	%	☐ Urgent ☐ High ☐ Mod ☐ Low	\$
			/24	/24	/24	/24	/96	%	☐ Urgent ☐ High ☐ Mod ☐ Low	\$
			/24	/24	/24	/24	/96	%	☐ Urgent ☐ High ☐ Mod ☐ Low	\$
			/24	/24	/24	/24	/96	%	☐ Urgent ☐ High ☐ Mod ☐ Low	\$

Portfolio Upgrade Investment Summary

Priority Level	Number of Units	Total Estimated Upgrade Cost	Recommended Budget Year
Urgent		\$	Current year
High		\$	Current or next year
Moderate		\$	Next 1-2 years
Low		\$	Monitor and reassess annually
Portfolio Total		\$	

PART 4: BUILDING THE UPGRADE CASE FOR LEADERSHIP

Use this section when presenting upgrade investment to operations or finance leadership. Frame the upgrade case around the dimensions where the equipment scored lowest - those are the guest experience, food safety, efficiency, and reliability gaps that leadership can understand as operational and financial risk.

Upgrade Case Summary Template

"[Equipment type] at [Location] scored [overall score] out of 96 on our upgrade readiness assessment - placing it in the [Urgent / High / Moderate] upgrade readiness category. The lowest-scoring dimensions were [dimension 1] at [score]/24 and [dimension 2] at [score]/24, indicating that this equipment is creating [specific guest experience / food safety / efficiency / uptime] gaps that current-generation equipment would address. Specific gaps identified include: [list 2-3 specific low-scoring statements from the assessment]. Upgrading this equipment at an estimated cost of \$_____ is projected to deliver: improved product consistency that reduces customer-detectable quality variation, a stronger food safety profile that aligns with

current standards, estimated annual energy and water savings of \$_____, and reduced emergency service call frequency based on the reliability gaps identified in the assessment.

Deferring this upgrade means continuing to operate equipment that is [guest experience / food safety / efficiency / reliability] compromised through [next peak season / next budget cycle], with the associated risks of [customer experience failures / food safety exposure / elevated operating costs / emergency service disruptions] during the period of deferral."

Dimension-Specific Talking Points for Leadership

- **On Guest Experience:** The beverage programs at our locations are habit-forming businesses. Customers who find a product they can rely on return for it consistently - and customers who encounter inconsistency redirect their habit elsewhere without telling us. Equipment that scores low on guest experience is not just delivering an inferior product - it is eroding the repeat customer relationships that make beverage programs profitable.
- **On Food Safety:** Ice is classified as a food by the FDA. Aging equipment with degraded antimicrobial surfaces, drainage systems that allow water pooling, and manual cleaning requirements that are difficult to consistently meet in high-volume operations creates a food safety profile that is inconsistent with the standards our brand is committed to. Modern equipment with built-in food safety design features addresses this risk directly.
- **On Energy Efficiency:** ENERGY STAR-rated ice machines save an average of 1,200 kilowatt hours and 6,300 gallons of water annually compared to standard models. Modern refrigeration-dependent beverage equipment consumes meaningfully less energy per unit of output than equipment from the prior generation. These savings accumulate across every operating hour and compound across a multi-location portfolio into a meaningful annual operating cost reduction.
- **On Operational Uptime:** The management burden of aging equipment - monitoring for developing problems, coordinating emergency service calls, managing the revenue impact of peak-season failures - is a real operational cost that does not appear on an invoice but is fully absorbed by the facility team and the business. Modern equipment with higher reliability profiles, remote diagnostic capability, and components designed for the sustained high-demand conditions of a Southeast summer reduces that burden directly.

PART 5: ANNUAL REVIEW CHECKLIST

Complete once per year - ideally before peak season planning begins - to confirm assessments are current and upgrade priorities reflect actual equipment condition.

- ☐ All assessments updated with current performance observations - not carried forward from prior year without review
- ☐ Any equipment whose condition has declined since last assessment rescored and priority level updated
- ☐ Any equipment upgraded since last assessment removed from the active assessment list and new equipment added
- ☐ Portfolio upgrade priority summary updated with current cost estimates
- ☐ Urgent and High priority equipment confirmed in capital planning process for coming year
- ☐ Any food safety flags from assessment reviewed with operations leadership regardless of overall score
- ☐ Pre-peak season timing confirmed for any upgrades scheduled for current year - Southeast operators should target upgrade completion before Memorial Day weekend
- ☐ Service vendor briefed on upcoming upgrades - installation scheduling confirmed for lowest-impact window before peak season