



Records Retention Checklist

Use this checklist to ensure your company is tracking, recording, and retaining the proper information about your flight department missions. Detailed records can provide data-driven support for your aircraft for internal and external audiences.

1. Adopt a business aircraft use policy.
2. Commit to consistent record-keeping and retention.
3. Ensure the metrics you are tracking and recording are in-line with your company's aircraft use policy.
4. Keep records on a trip-by-trip basis, not filling in the blanks at the end of the year.
5. Maintain complete records to capture all uses and benefits on a segment-by-segment basis, including multiple purpose trips.
6. Retain records long enough to assemble an effective data-driven argument illustrating the value of business aviation to your company.
7. Log trips for their applicability to "utilization strategies" priorities.
8. Find out what benefits are being sought or accrued for the business for each trip by surveying the passengers or authorizer.
9. Answer how the use of business aircraft was instrumental to supporting the trip's mission and company goals.
10. Be careful to try to isolate the unique benefit provided by the use of the aircraft. A sale closed, for instance, is the result of the existence and availability of a product or service at the right price, a positive relationship with the customer, etc. What can your customers point to that measures the successful outcome of the business aircraft use?
11. A simple checklist approach to log each flight's purpose can work to expose the value created by business aircraft.
12. You may want to gather enough information about the time or cost avoidance aspects of the trip (travel time saved, nights away from home saved, productivity enroute, etc.) so that a more detailed analysis of cost avoidance and enhanced productivity can be tabulated later.