



General Brainstorm Checklist for Relocation Preparations

PLEASE NOTE: This list is not intended to be comprehensive. Each project has its own scale and so the scope of the requirements will require customization by an individual experienced in a variety of corporate relocations. This list is intended to be a brainstorm stimulator and should be used by a team of people who will be involved in preparing the company for relocation as well as managing the details of the relocation itself. The order of tasks is also variable depending on the project.

The successfully managed move is one in which your relocation is unnoticed by your customers and clients except by your thoughtful announcement. There are four areas of preparation to be considered in the movement of a company's operations from one location to another.

- A.** Prepare the **Company** to be moved.
The planning here includes all the governmental connections including but not limited to permits, licenses, agreements, site specific agency approvals, customer and industry certifications for federal, state, and local authorities at every level. Also included would be investment banking, insurance companies, bonding agencies, etc.
- B.** Prepare the **Business** to be moved.
Included in this area are every customer, vendor, supplier, web based connection or presence, package delivery service, transportation company, maintenance organization, professional organization, including those who look to you for information or advice in your market niche.
- C.** Prepare the **People** to be moved.
One of the greatest and most expensive assets your company possesses is your people. Your relocation is the rare chance to make positive changes in corporate culture, attitudes, behavior, and performance. How it is planned and managed can demonstrate care for people in such a way as to elevate their excitement, loyalty, retention, and job satisfaction. It can enhance the performance of people by elevating their perceived value to the company while enhancing the value of the company to them. And it can ensure uninterrupted and elevated productivity, enhancing the corporation's value to its customers, its suppliers, and its community.
- D.** Prepare the Company **Stuff** to be moved.
The easiest of these four phases is often the movement of content from point A to point B. Yet it still requires careful planning and organization of the little details. The objective is to move your personnel, their tools, and their supporting documentation in such a way that there is no lost productivity. Technology must be disconnected, relocated, reconnected and tested long before your first employee enters the door to unpack their office. Even the actual destination of the contents of each box, crate, or cart must be identified prior to the move to enable everything to be put away quickly.

In each of these areas of focus, teamwork is essential. There are so many details in so many disciplines, that you will need to assemble a crack team of knowledgeable and creative people. The list which follows will expand your understanding of just how important a team will be to your successful relocation project. Also note that this list begins very early in the planning process, even prior to the selection of a future site.

As you review the list you will find some tasks that will seem like they do not apply to your move, especially if you are moving just a few people. But do not be deceived. Most of these issues at least need your thoughtful consideration to avoid missing critical details.

The List

1. Study current operations and assess future needs to determine the size of the new facilities based on your long range business plan and corporate objectives.
2. Establish clear objectives for your relocation project with definition of success.
3. Assess alternative sites, locations, offices and facilities and prepare decision matrix for comparison of advantages and disadvantages for each location.
4. Evaluate and select sites with the assistance of a facility planner and architect conducting fit tests by function and priorities.
5. Negotiate your lease (or purchase) of new office space with the landlord (or owner). Use a competent commercial real estate advisor working for you who is not representing the building owner, landlord or property management company.
6. Prepare your own detailed program plan that assesses the current space and functional needs of each group in priority of impact on income and profitability based on business plan and current marketplace objectives.
7. After a careful evaluation process, select an appropriately experienced architect or design firm to renovate and lay out new office space and prepare floor plans, office spaces, workstation layouts based on proper workflow analysis and proximity study.
8. Design the facility and the internal layouts for all spaces.
9. Prepare RFP for an outside Relocation Project Manager who is experienced and skilled at managing the entire process from this point onward. This is not the time for a packing instructor.
10. Have your Relocation Project Manager prepare a detailed planning schedule of all the issues to be addressed in the proper order to track plan development progress.
11. Establish a clear communication plan with protocols, schedule, and responsibilities.
12. Arrange for telephone and data trunk lines at the new address with a detailed plan for cutover and transfer that eliminates downtime. Secure commitments from each service provider for the schedule and plan carefully so that they are not in each other's way.

13. Inventory all contents being moved to identify the scope of the work for each discipline, including movers, IT infrastructure, technology disconnect & reconnect, telecom system replacement or relocation, copier services, etc.
14. Identify clearly what is being moved and what will not be moved, for both company and employee owned property.
15. Identify concurrent management or structure changes, technology infrastructure and software changes, equipment replacement plans, and any other change the company is contemplating during the 2 months prior to and 2 months after the scheduled move date.
16. Establish all responsibility tracks for accidental damage to physical assets owned by your company and determine insurance requirements based on self insurance, special company secured insurance, or special mover supplied insurance. Determine that such processes will not apply to employee owned content.
17. Once the objectives are established, the inventory of contents completed and schedule constraints are clear, write a comprehensive RFP for each discipline (movers, technology, etc.) that quantifies the scope of work clearly and describes the selection criteria.
18. Set schedule for verification of bidders, job walks, question period, submission dates, interview dates, and announcement of winning bids.
19. Collect RFP responses from all the vendor disciplines.
20. Prepare decision matrix for side by side comparison of RFP responses of all bidders for team evaluation.
21. Select appropriate vendors and bring them into your planning process.
22. After selection, obtain final pricing for all technology related changes such as telephone instruments or system printer replacement with multi-function devices, etc.
23. Establish a budget based on real numbers from all proposals, projected employee costs, equipment, tools, supplies, outside project manager, water & food supplies during moves, and include a contingency.
24. Prepare a solid presentation with the relocation project manager to explain the move plan to all your key executives and management team.
25. Secure all telephone number(s) for the new location.
26. Order all technology equipment and secure delivery and installation dates.
27. Get change of address forms from the post office (allow at least 6-8 weeks for subscriptions and other companies to update their records).
28. Place a conditional order for new stationery using the new address, subject to confirmation of the new telephone number.

29. Notify utilities and services of the new address and new phone, clearly identifying the schedule for each announcement or mailing. Include insurance, electricity, water, cleaning service, the IRS, subscriptions, banks, checking accounts, printer, security, etc.
30. Check all major office equipment (computers, word processors, automated office appliances, postage meter, etc.) and heavy industrial equipment for disassembly and reassembly at the new site.
31. Determine which equipment and furniture to keep, and which to sell or dispose of along with the liquidation and disposal strategy.
32. Based on the approved space plan, prepare basic specifications of all furniture you will need to secure. Be sure filing and storage have been properly accounted for throughout your building.
33. Prepare RFP with the help of your architect, interior designer, and relocation project manager to allow proper evaluation of pros and cons for each manufacturer along with all potential pricing options. There are many details to watch for, so secure trustworthy advice in the selection process, especially if you are changing standards and product manufacturers.
34. Follow a similar process to the previous RFPs.
35. Sign the contracts for the purchase or lease of all new office furniture.
36. Identify key departmental representatives from all affected departments, moving or not, that will act as delegate liaisons between the planning teams and all employees.
37. Keep all employees regularly informed in memos, internal web postings, monthly newsletters, email announcements and monthly formal meetings. Be sure they understand their roles and the importance of their communication back and forth with the planning team.
38. Review your corporate insurance policies to itemize the business equipment, appliances and furniture that are covered before, during and after the move.
39. Notify vendors of the new address and the date that their products will be accepted and received at the new location.
40. Clarify labor policies at the new location, and any move-in restrictions.
41. Determine all licenses and permits required, if any, at the new location as part of Area A above.
42. Prepare to sell or discard obsolete furniture and equipment. Find buyers, or donate to charity for a tax deduction.
43. Clarify who is to do the packing: you (your employees), your mover, or what combination.
44. Determine the number of crates or cartons needed per office, or per employee. Order from your mover based on move plan.
45. Transfer your insurance coverage to the new location.

46. Determine the best access and routes from the old to the new locations. Plan your move schedule based on the conditions you will encounter on move day.
47. Go over floor plans, office spaces, wall partitions, heavy equipment, conference rooms, public and private facilities with key executives and employees for suggestions. Can the new elevator lift heavy items? Is it large enough? What are the usage restrictions?
48. Make sure the telephone company will have installed a recording at your old phone number that gives out your new number. Insist that the recording must be in place for at least six (6) months. Confirm this in 2 months and again in 2 weeks prior to your move.
49. Confirm that the carpeting and asphalt or concrete driveways at the new address will be in place before furniture delivery and move-in days.
50. Determine if you will attempt to execute the move over a weekend or after regular business hours to avoid interruption of business.
51. Prepare to remove your present security systems and procedures, and to install them (or new systems and procedures) into the new site.
52. Delegate and assign responsibilities to each of the coordinators of the move. Rehearse if necessary.
53. Prepare detailed security plan for both origin and destination sites including protection of access from employees or visitors who do not belong, and protection of the loading area and unlocked vans during all loading and unloading processes.
54. Explain to each employee explicitly and exactly what they will be required to do. It is best to hold formal group meetings with required attendance in which written materials are distributed and discussed by your relocation project manager.
55. Color-code all office furniture and office equipment, to indicate where each item will go on the color-coded floor plan.
56. Prepare color coded origin plans to ensure that every location has been checked and double checked for all content so nothing is left behind, or taken when it should have been left behind.
57. Mark, tag and color-code every item to be moved.
58. Take mover and other service providers on a detailed walk through prior to the start of their work on move day to identify any existing damage, with pictures and blue marker tape. This will prevent post move finger pointing between contractors and movers and reduce your headaches.
59. Check elevators and doors at the old and new locations for ease of egress and entry.
60. Verify that destination site is indeed ready the day before and 2 hours before the arrival of your relocation vendors.
61. Make sure all employees know what to do, when and where to report to their new workstations.

62. Prepare welcome packet with test scripts for each employee to verify that each piece of software and each peripheral can be properly accessed.
63. Establish security procedures for the move itself and delegate. Decide how to check that items removed from all locations appear at the new location.
64. Install locks and make duplicate keys for the new location, keeping one set in a locked cabinet with proper identification. Distribute the keys to the appropriate employees.
65. Re-confirm that telephones at the new address are or will be operating properly on or before move-in day. Verify all fax numbers.
66. Arrange to feed your employees and vendors, if appropriate, during the move, or on delivery day, at the new location.
67. Set up communications between the old and new locations for all members of your move team by radio or telephone.
68. Read all the bills of lading carefully before you sign. It is the contract between you and your mover. Keep it with you until everything is delivered, charges are paid, and any claims are settled.
69. Seal each van when full and track the seal number, the time of departure at origin and the time of arrival at destination.
70. Require your relocation project manager and their team to be on hand to answer questions and give directions to the movers during any time a mover team is working at either origin or destination.
71. Examine the seals on the van and have security protocol in place or security guards who unseal and verify that the seals have not been tampered with.
72. Reconfirm that when you call your old telephone number, a recorded message or an operator gives out your new telephone number correctly.
73. Remove all cartons and debris.
74. Note on the inventory any damaged boxes or items before you sign anything. This is necessary to process any claims.
75. Throughout the move process be sure that each origin and destination location has been checked for items to be moved and that they have each been properly placed in the correct location.
76. Follow-up with all employees on a personal basis. Insure that all needs are met within 1.5 hours of their arrival.

Again this is just a partial list. Your relocation project manager will develop a list specific to your needs, your situation, and the objectives of your project.

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