

## **Business Move Checklist**

- Select a move committee. This is typically made of representatives from IT, HR, Operations and other interested and qualified people.
- Establish a preliminary relocation budget.
- Next, determine whether the move warrants hiring a third-party move management consultant. If so, interview and hire a third-party partner.
- Coordinate moving of servers with IT provider/support.
- Contact telecommunications/data provider to schedule a cut-over date.
- Contact telephone provider to get new numbers or move existing.
- Then, order data circuits and/or specialty circuits (check for lead times).
- Order phone lines for elevator, security and any other item that may require a phone line.
- Confirm your long distance carrier or change it.
- Then, determine if any equipment requires specialized or approved vendors to move it. This could include copiers, lab equipment, certain electronics or manufacturing equipment.
- Finally, check the existing lease for restoration requirements/conditions for returning current space to the landlord.

### **Don't forget to:**

- Reserve the building elevator (existing for move out, new for move in).
- Order keys from the building.
- Contact the building to confirm locations of signage.
- Hire signage vendor to plan, get approval for, and install new signage.
- Next, obtain a qualified mover by interviewing 2-4 companies, depending on the size of job.
- Order new stationery, business cards and forms.
- Notify your clients of a change of address.
- Contact the post office for a change of address.
- Contact your bank for a change of address.
- Notify vendors of change of address (coffee service, vending machines, etc.).
- Contact the IRS for change of address.
- Change address with any publications that are delivered to the office.
- Notify the insurance carrier of change of address and new office's requirements.
- Obtain certificates of insurance for the landlord, and any entities required by the lease.
- After, contact the Franchise Tax Board for change of address.

- Contact the Employment Development Department for change of address.
- Finally, contact the Secretary of State for change of address.

## **Business Move Coordination Tasks**

### **2 Months Prior to Move:**

- Coordinate with IT on server move, desktop, and PBX timelines.
- Assemble 'Move Team' with each department having a 'Move Liaison'.
- Schedule weekly move coordination meetings – prepare and distribute weekly minutes & schedules.
- Review & define areas of responsibility
- Move sequencing/timeline preparation
- Collect all furniture layout plans from employees for their new spaces.
- Common areas (coffee/break rooms, copy rooms, etc.)
- De-installation & installation responsibilities – coordination of timing
- Prepare lab equipment ID matrix of all equipment moving (if applicable) – check/review special equipment installation compatibility/requirements (coordinate with users).
- Finally, develop a preliminary move schedule.

### **1 Month Prior to Move:**

- First, assign move numbers/labeling/tagging scheme – prepare floor plans/layouts.
- Create employee move packets and instructions on how to move.
- Prepare agenda for employee move orientation meeting.
- Create a public relations campaign with press releases to highlight new location and/or office-warming party.
- Secure off-site storage location for old files
- After, discuss and agree on move insurance needs with company.
- Modify new space to meet equipment demands as necessary (coordinate with users).
- Determine security procedures for the move.
- Coordinate to add your listing to lobby directory at new site
- Finally, fine tune the move schedule.

### **2 Weeks Prior to Move:**

- First, finalize move schedule.
- Hold employee move orientation meeting.

- Distribute employee move packets.
- Schedule packing material and label delivery.
- Prepare an employee welcome packet to the new space (restrooms, gyms, break rooms, copy rooms, etc.).
- Move team preparation for move – channels for communication, change requests, etc.
- Schedule move day on site help.
- Create a list of emergency contacts, cell phone numbers, and vendors that includes moving company, building management, utilities, telecommunications, etc.
- Identify 'lost and found' at both origin and destination.
- Identify move command central – for mover and employee inquiries.
- Select cleaning vendor for post-move.

## **Move Week:**

- First, schedule additional packing material and label delivery.
- Tag and label destination site – room numbering and equipment IDs.
- Mount 'You are here' floor plans and color-coding instructions.
- Schedule training for all emergency procedures at new location.
- Distribute contact lists for emergency/on site/on call lists.
- Review and finalize all move sequences/schedules – distribute to move team.
- Prep building for move – surface protection, corner guards, etc.
- Distribute new security ID card key entry badges.
- As close as possible to moving day – change locks and access codes at new location.

## **Move Day(s)**

- First, assign origin and destination move liaisons.
- On site help to coordinate move related questions, etc.
- Next, complete job walk each day of move of schedule/completion/damage, etc.
- Prepare 'honey-do' lists.
- Then, allocate keys and/or access cards for new location.
- Distribute employee welcome packets at their new destinations.