

Relocation Planning Checklist

1. Study current operations and future needs to determine the size of the new facilities.
2. Develop alternate sites, locations, offices, and facilities.
3. Evaluate and select sites with the assistance of a facility planner, architect, or interior designer.
4. Negotiate your lease (or purchase) of new office space with the landlord (or owner) Use a competent real estate attorney.
5. Select an architect or design firm to renovate and layout new office space and prepare floor plans, office spaces, wall partitions, etc.
6. Design the facility and the layout.
7. Arrange for telephone trunk lines at the new address.
8. Collect estimates from movers, and riggers (if necessary).
9. Select an appropriate mover and rigger.
10. Check costs of insurance, packing, and loading.
11. Check delivery claims procedures.
12. Explain the move to your key executives.
13. Obtain estimates for the telephone system and its installation at the new address.
14. Select telephone equipment for the new location.
15. Secure telephone number(s) for the new location.
16. Order telephone equipment.
17. Get change of address forms from the post office (allow 6-8 weeks for subscriptions and other companies to update their records).
18. Place a conditional order for new stationery using the new address, subject to confirmation of the new telephone number.
19. Notify utilities and services of the new address and phone. Include insurance, electricity, water, cleaning service, the IRS, subscriptions, banks, checking accounts, printer, security, etc.
20. 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. Delegate this task for a complete follow-through.
21. Determine which equipment and furniture to keep and which to sell.
22. Buy or lease new office furniture.
23. Explain the move to all employees in memos and meetings. Delegate and clarify all tasks and assignments. Use assignment cards.
24. Review your corporate insurance policies to itemize the business equipment , appliances, and furniture that are covered before, during and after the move.
25. Notify vendors of the new address and the date that their products will be accepted and reviewed at the new location.

Relocation Planning Checklist Continued

26. Clarify labor policies at the new location, and any move-in restrictions.
27. Determine licenses and permits required, if any, at the new location.
28. Prepare to sell or discard obsolete furniture and equipment. Find buyers, or donate to charity for a tax deduction.
29. Clarify who is to do the packing: you (your employees), your mover, or what combination.
30. Transfer your insurance coverage to new location.
31. Investigate potential events that may occur that will impact the move. Avoid moving on heavy-traffic days.
32. 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?
33. Take inventory of all the items to be sold off or moved.
34. Make sure the telephone company will have installed a recording at your old home number that gives out your new number. Insist that a recording must be in place for at least six (6) months. Confirm this in 2 weeks.
35. Determine if you will attempt to execute the move over a weekend or after regular business hours to avoid interruption of business.
36. Prepare to remove your present security systems and procedures, and to install them (or new systems and procedures) into new site.
37. Delegate and assign responsibilities to each of the coordinators of the move. Rehearse if necessary.
38. Explain to each employee explicitly and exactly what they will be required to do: remove desk materials, pocket books and files; color code boxes, etc.
39. Mark and tag all items to be moved per the color coded system.
40. Make sure all employees know what to do, when and where to report to their new workstations.
41. Establish security procedures for the move itself and delegate. Decide how to check that items are removed from all locations appear at the new location.
42. Confirm that new letterhead, envelopes, and business cards are printed after move-in day (when new numbers are absolutely certain).
43. Install locks and make duplicate keys for the new location. Distribute the keys to the appropriate employees.
44. Reconfirm that telephones at the new address will operating properly on or before move-in day.
45. Arrange to feed your employees, if appropriate, during the move, or on delivery day, at the new location .
46. Set up communications between the old and new locations. Telephone is easiest.
47. Be on hand to answer questions and give directions to the movers.
48. Reconfirm that when you call your old telephone number, a recorded message or an operator gives out your new telephone number correctly.
49. Note on the moving documents any damaged items. This is necessary to process any claims.