

# Business Move Checklist

HELPFUL TOOLS | CONSTRUCTION MANAGEMENT

## 3+ Months Prior to Move:

- Select a move committee.
- Establish a preliminary relocation budget.
- Determine whether the move warrants hiring a third-party move management consultant.
- Coordinate moving of servers with your IT provider or support person.
- Contact your telephone provider to get new numbers or relocate existing. Confirm your long distance carrier or consider other options.
- Determine if any equipment requires specialized or approved vendors to move it. This could include copiers, lab equipment, certain electronics or manufacturing equipment.
- Check your existing lease for restoration requirements/conditions for returning the current space to your landlord. Schedule a meeting with existing landlord to review these requirements.
- Contact your telecommunications/data provider to schedule a cut-over date.
- Reserve the building elevator (existing for move-out, new for move-in).
- Order keys from the building.
- Contact the building to confirm location of signage. Hire a signage vendor to plan, get approval for, and install new signage, if applicable.



- Obtain a qualified mover by interviewing 2-4 companies, depending on the size of job.
- Order new letterhead, business cards, forms, and other printed marketing materials.
- Coordinate updates to your website, email signatures, and any place else where your address appears so they can be implemented on the day of your move.
- Notify your clients of change of address.
- Contact the post office, your bank and vendors (coffee service, vending machines, etc.) for change of address.
- Contact the IRS, Franchise Tax Board, Secretary of State, and Employment Development Department for change of address.

- Notify your insurance carrier of change of address and new office requirements. Obtain certificates of insurance for the landlord, and any entities required by the lease.

## 2 Months Prior to Move:

- Coordinate with IT on server move, desktop, and PBX timelines.
- Assemble a move team with each department having a move liaison and schedule weekly coordination meetings.
- Collect all furniture layout plans from employees for their new spaces.
- Prepare a lab equipment ID matrix for all equipment being moved (if applicable). Coordinate with users to review special equipment installation/compatibility requirements.



- Develop a preliminary move schedule.

### 1 Month Prior to Move:

- Develop a labeling/tagging scheme and assign move numbers. Prepare floor plans/layouts.
- Discuss and agree on move insurance needs with your company.
- Create public relations campaign with press releases to highlight new location and/or office-warming party.
- Coordinate with new site to add your listing to lobby directory.
- Determine security procedures for the move.
- Secure off-site storage location for old files.
- Fine-tune move schedule.

### 2 Weeks Prior to Move:

- Finalize move schedule.
- Host employee move orientation meeting.
- Schedule packing material and label delivery.

- Prepare employee welcome packet for the new space (restrooms, gyms, break rooms, copy rooms, etc.).
- Establish channels for move team communication and protocol for change requests.
- Create list of emergency contacts, cell phone numbers, and vendors that includes moving company, building management, utilities, telecommunications, etc.
- Schedule on-site help for move day.
- Identify a 'Move Command Central' for mover and employee inquiries.
- Select cleaning vendor for post-move.

### Move Week:

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

### Move Day(s):

- Assign origin and destination move liaisons.
- Coordinate On-site help to handle move related questions, etc.
- Complete job walk each day of move to track progress, confirm the move is on schedule, and identify any goods or walls that might have been damaged during the move.
- Allocate keys and/or access cards for new location.
- Distribute employee welcome packets at their new destinations.

### Post-Move Support:

- Maintain 'Move Command Central' post to support employee inquiries, manage lost & found, track honey-do lists, etc.
- Dispatch appropriate team(s) for post-move set-up – hanging white boards, equipment fit up, etc.
- Distribute new contact list and layout of department locations.
- Collect all access items including security cards, keys and parking passes for old location and confirm return of deposits held by landlord for items.
- Survey for damage. Prepare and submit reports.
- Prepare move punch list and action items. Coordinate with appropriate contractors to address all issues, and track to completion.
- Review final invoices against contracts.
- Enjoy your new space!