



# BUSINESS RELOCATION CHECKLIST



Business Transition 360 has an accomplished team of professionals who have experience in property management, relocation, construction management, space planning and our business furniture dealership. The following list includes the many initiatives and tasks you should plan for when relocating your business and furnishing a new office space.

## Managing an Office Relocation

Moving into a new office is an exciting event! This can be a fantastic opportunity for recruiting new employees, better branding your space, engaging employees and department leaders as you send a message to the employees that their comfort in their workspace is important to you and your company. If you're the one responsible for managing this event, be prepared as it is a job in of itself. **Corenet and IFMA both report that 40% of furniture and relocation projects fail in the eyes of company leadership.**

The key to keeping it simple is to break it down into effortless and manageable steps, and of course find a great partner to assist with all aspects of the transition (leasing agent, tenant rep, design, space planning, architect in some instances, furniture and project managers). Using our 25 years of experience, we've listed most everything you need to think about – from the beginning stages of the project to move-in day to space decommissioning and broom sweeping.



## Physical Transition

- 360-1** Form a transition committee or team with representation from all affected divisions or groups located in the office transitioning, for example, marketing, sales, operations, IT, warehousing, etc.
- 360-2** Teamwork is paramount. If group or division leadership is located in another office, ensure that they are looped in to get buy in and authorization for the transition plans. There are countless details in so many disciplines. It is critical to ensure the leadership team has approved the transition team members and plans, giving them authority to plan, lead, spend and execute the transition project.
- 360-3** Find and designate your team members 12-18 months before your lease and transition initiative begins.
- 360-4** As you review some of the items to follow, you may not think they apply to your situation. Even when moving a few people, don't be deceived; most of these issues require thoughtful consideration.
- 360-5** Study current operations and assess future needs to determine the size of the new facility based on long-range business plans and overall corporate objectives.
- 360-6** Determine if you will have remote workers, flexible space needs, training and development room needs, warehouse needs, open environments and office space needs.
- 360-7** Assess alternative sites for better functionality and growth scenarios.
- 360-8** Ensure to involve facilities planner, designer, and architect then prepare a decision matrix for comparison of advantages and disadvantages for each location.



## Choosing a “Move” Champion

About 12 months before you're planning to move, you should decide who's going to be involved, and start to outline your key requirements. Select a team and assign clear roles and responsibilities.

### Who has what it takes to manage the move?

- 360-9** Senior enough to make decisions
- 360-10** Experienced in multi-tasking
- 360-11** Good motivator
- 360-12** Knows your business inside and out
- 360-13** Great communicator
- 360-14** Highly organized
- 360-15** Good at sticking to a budget



## Defining Roles and Responsibilities

Involving others and keeping people in the loop will prevent surprises and delays further down the line. For example, there's no reason to approve a design until the move team has approved it, along with the executives in charge.

- 360-16** Managing Director
- 360-17** Facilities Director
- 360-18** Office Manager
- 360-19** IT Director
- 360-20** Operations Manager
- 360-21** Marketing
- 360-22** Human Resources
- 360-23** PAs



**Relocation Tip:** Don't forget the administration staff. They probably know more about what's going on in your organization than anyone else.



## Engaging Your Stakeholders

Engaging stakeholders can be one of your most critical decisions. To insure you are retaining quality people, make sure you are including the leadership that drives and sustains your business and productivity throughout the transition.

### Have you consulted with...

- 360-24** Unions? Contract partners? Affiliates?
- 360-25** Regulators? Building commissioners? County government for incentives?
- 360-26** Parent company?
- 360-27** Board members?
- 360-28** Department heads?
- 360-29** Staff?
- 360-27** Board members?
- 360-28** Department heads?
- 360-29** Staff?





## Defining Location Priorities

You could find what you consider to be the perfect office, but if the location isn't right, then it just won't work for your company. Consider the following criteria when selecting locations for your new base:

- 360-30** Good public transportation links
- 360-31** Easy for clients to visit
- 360-32** Easy for you to visit clients
- 360-33** Realistic commute for existing employees
- 360-34** Local amenities (shops, restaurants, pharmacies, etc.)
- 360-35** Good access to major roadways
- 360-36** Excellent access to major airports
- 360-37** Access to a 'talent pool' of potential employees
- 360-38** Parking



## The Project Budget

A relocation project can be one of the most expensive events in the life of a business. Moving forward without a clear idea of budget is like sailing without a compass. All reputable suppliers will provide full cost estimates, free of charge. This will enable you to communicate with the rest of your business the real financial impact of your move.

Get quotes for everything and draw up a full budget for the entire project, including:

- 360-39** Occupancy costs (such as rent, service charges, taxes, energy, maintenance, etc.)
- 360-40** Transaction fees (for property agents, lawyers)
- 360-41** Insurance costs
- 360-42** Fire plan assessment
- 360-43** Design and fit-out costs
- 360-44** Environmental assessments
- 360-45** IT – cabling, and IT equipment relocation fees
- 360-46** Furniture – the cost of new furniture, delivery and installation. Can you trade in furniture?
- 360-47** Disposal costs (of old furniture, computers, rubbish) – Decommission costs
- 360-48** Extra security during the move





## The Project Budget continued...

- 360-49** Printing costs
- 360-50** Telecoms – equipment and installation
- 360-51** Marketing costs – new stationery, announcements, invitations, website update of new address, plus mail redirection
- 360-52** Contingency (it is not uncommon to budget an extra 20% for contingencies and changes)
- 360-53** Decommission costs for your old space (many leases require you to put your old space back to its original condition)
- 360-54** Tenant improvement costs for your new space
- 360-55** Air conditioning, heating and ventilation (check the condition of the HVAC plant in your new building)
- 360-56** Energy performance (not only do you have to budget for electricity and gas, but you also now must consider ‘green’ regulations for your new space)
- 360-57** Temporary storage during the move



## Tax Considerations

You’re spending enough money for there to be plenty of opportunities for tax breaks.

Talk to an expert.

- 360-58** Find out how to make the most of your capital allowances.
- 360-59** Look into leasing options for the design and fit-out works.
- 360-60** Ask about enhanced capital allowances for sustainable or ‘green’ equipment/products.
- 360-61** Look into interest free loans (if you are an SME) from The Carbon Trust.



## Commercial Property Agents

Make sure you’re talking to the best people in the business.

- 360-62** Quality references
- 360-63** A good grasp of the technical side
- 360-64** Enough time to devote to your project
- 360-65** Good knowledge of the area you’re searching in
- 360-66** National reach
- 360-67** Transparent fees and charges





## Office Design and Fit-out Companies

The bulk of your costs will fall into the fit-out and design category of your relocation. It makes sense to engage with a good office design/fit-out consultancy in the early stages, so you can plan ahead.

If you haven't selected your space, your office design consultancy can help you by calculating the amount of space you need – including all services and storage. Make sure you don't leave anything out, because if you end up with too little space, you'll have to move too soon. Too much space and you're throwing money away every month.

If you've found your space, your office design/fit-out partner can really help by surveying your new building, coming up with cost estimates and helping you visualize your new space. That way, you'll avoid any surprises later on.

Make sure you hire a design/fit-out company that offers complete 'turnkey' solution. It will save you time, money, and the hassle of having to manage multiple parties.

### Verify and Vet their offerings – Project Management Overview:

#### For your entire project:

- 360-68** Calculation of your space needs
- 360-69** Surveying of your new building
- 360-70** Full cost estimates
- 360-71** Space planning
- 360-72** Interior design
- 360-73** Fit-out and construction
- 360-74** Furniture selection and procurement
- 360-75** Mechanical & electrical design and installation
- 360-76** Air conditioning, heating and ventilation
- 360-77** Plumbing
- 360-78** Planning permission (will they arrange it for you?)
- 360-79** Disabilities Discrimination Act (do they have enough knowledge so your new office will comply?)



## Office Design and Fit-out Companies continued...

- 360-80** Health and safety
- 360-81** IT cabling, moving and installation
- 360-82** Telephone systems (do they have experience in putting systems?)
- 360-83** Will they arrange (and guarantee a connection in time) with the phone company?
- 360-84** Move management (crates, packing and moving, plus furniture assembly)
- 360-85** Do they work to a fixed budget?
- 360-86** Will they guarantee on-time completion?
- 360-87** Are they financially stable? (Could they absorb the cost of your build?)

 **Relocation Tip:** Many small office design and build firms will fund the project with your deposit. Check the total project cost as a percentage of their annual turnover. If it's too high, your move could be at serious financial risk.

- 360-88** Do they have the backing of a parent company?
- 360-89** Do they have the purchasing power or partnerships to negotiate special deals?
- 360-90** Have they managed relocations before (and for whom)?
- 360-91** Can they help you define your requirements and put together your brief (through workplace appraisals, surveys, etc.)?
- 360-92** Do they have their own health and safety experts?
- 360-93** Are they environmentally conscious?
- 360-94** Can they design and build a sustainable office for you?
- 360-95** Do they have proper insurance in place?
- 360-96** Are they willing to provide quality references?
- 360-97** Will they arrange for you to visit other offices they've done?
- 360-98** Does their team inspire your confidence and trust?
- 360-99** Do they offer excellent value for the money?





# Feasibility Studies

A well-done feasibility study will save you thousands. Not only will it help you to determine how much space you need and how to accommodate your people, it will also help you plan for future growth and avoid the need for an unplanned, costly expansion or move.

## A good office design consultancy should do this for you.

Take a new look at how your teams work together; you might need to rearrange which department goes next to which.

- 360-100** Work out growth rates for each department and plan for changes in your space plan.
- 360-101** How many people/workstations will you need to accommodate?
- 360-102** What sorts of spaces (kitchen, executive offices, common room, etc.) would you like?
- 360-103** How much space do you think you'll need (in square feet)?
- 360-104** What's your timeline?
- 360-105** Calculate current size, capacity and usage needs for:
  - 360-106** Reception areas
  - 360-107** Meeting rooms
  - 360-108** Executive offices
  - 360-109** Presentation suites
  - 360-110** Kitchen/tea points
  - 360-111** Common room
  - 360-112** Break out spaces
  - 360-113** Toilets
  - 360-114** Showers
  - 360-115** Copy areas
  - 360-116** Mail room
  - 360-117** Recycling points
  - 360-118** Other (i.e. trading floor, library)





## Storage Considerations

Often overlooked, storage can make the difference between happy staff and grumbling workers. Office relocation is an opportune time to reassess and calculate your storage needs.

- 360-119** What's your storage situation like now? How much and what do you need for the new office?
- 360-120** Storage for individuals – at desks or lockers
- 360-121** Document storage
- 360-122** Storerooms (for office supplies and equipment)
- 360-123** Secure storage and safes
- 360-124** Off-site storage – can you reduce the amount of space you need by moving long-term storage off-site?
- 360-125** Complete analysis for storage cost off-site before simply contracting. Many companies store furniture that is never used again.

 **Critical Note:** Our experience is that 30% of companies we serve spend thousands a year on warehouse storage.

- 360-126** Don't forget the basics – coat racks or closets



## Environmentally Friendly and Sustainable Offices

- 360-127** Consider a BREEAM rating or some other environmental rating system.
- 360-128** Put energy efficiency at the forefront of the design.
- 360-129** Design in recycling points.
- 360-130** Maximize use of natural light.
- 360-131** Specify furniture with a high proportion of recycled content.
- 360-132** Choose fixtures, fittings and carpet with a high content of recycled materials, which can be recycled at their end of life.
- 360-133** Use paints with low amounts of toxins.
- 360-134** Only use timber that has been certified by the FSC.





## Communicating with Your Stakeholders

Confusion at the time of relocation can cause anxiety amongst staff. It will pay dividends to keep everyone involved and create buy-in for the move.

- 360-135** Give people a way to voice their honest opinions and objections (such as an online forum).
- 360-136** Provide access to an extranet to share files and plans (for the project team).
- 360-137** Hold formal presentations of design ideas for staff.
- 360-138** Go on-site visits with key stakeholders.
- 360-139** Give staff tours of the office before it's finished.
- 360-140** Create a 'move' newsletter for staff.
- 360-141** Give staff members an info pack on the new local area.



## Building Surveys

A close look at your building can save you thousands down the road. For example, the heating and ventilation system may look good, but it may need a major upgrade. A good design and fit-out company could survey your new space and at the same time estimate costs and timescales. It is also critical to get some indicative designs drawn up at this point. It's the only way you can accurately estimate fit-out costs.

- 360-142** Condition (if it's an old building, is it possible to bring it up-to-date?)
- 360-143** Flexibility (will it adapt easily, as your business evolves?)
- 360-144** Disabled facilities (do you know what your responsibilities are?)
- 360-145** Air conditioning (you may want to commission a special survey – if you share services with other companies, you should make sure you're getting your fair share of cool air.)
- 360-146** Elevators (can the elevators take goods and equipment? If not, you'll need to put extra money in your budget for the movers to carry things upstairs.)
- 360-147** What's new, second-hand, serviced or missing?
- 360-148** Has the building been rated as energy efficient? (From 2008, the building will need an energy efficiency rating.)
- 360-149** Security (is the space secure? Check all windows, doors and hatches, and get the landlord to fix any problems.)
- 360-150** Fire plan – It is your responsibility to have an escape plan in place. At this point you may want to check that you don't have to alter your new space to comply with fire regulations.
- 360-151** Check for asbestos and other hazards and risks. (Specialist audit, type III survey, risk assessment)
- 360-152** IT and electrical – Looking at the space, now is a good time to get an idea of the work that will be needed to install floor boxes and data points, and to run cabling.



## The Neighborhood

- 360-153** Are any competitors based nearby?
- 360-154** Are any potential partners based nearby?
- 360-155** Are the other tenants good quality companies?
- 360-156** Are there any off-putting noises, smells or other issues?
- 360-157** Are there issues with the local area?
- 360-158** Is the area safe? Check crime statistics.



**Relocation Tip:** Ask your future landlord if there are any major upgrades planned to the building, as you may have to pay for them in common area maintenance charges.



## Legal and Financial

- 360-159** Lease terms (any unusual clauses?)
- 360-160** Landlord incentives (any extra perks to offer?)
- 360-161** Have you negotiated a rent-free period?
- 360-162** Have you looked into future levels for service charges?



## Business Rates

Make sure you don't overpay on your rates. Ensure your real estate agent completes a market place analysis.

- 360-163** Get professional advice (tenant rep).
- 360-164** Arrange for an audit rating.
- 360-165** Look into local authority appeals.
- 360-166** Talk to your new neighbors.
- 360-167** Check vacancy rates – are tenants leaving for some reason?





## Insurance

- **360-168** Review your corporate insurance policies to itemize the business equipment, appliances, and furniture that are covered before, during and after the move.
- **360-169** Make sure you have all the insurances in place before the work commences.



## Sign the Lease

- **360-170** Once all the terms are agreed to your satisfaction sign on the dotted line.
- **360-171** Determine all licenses and permits required, if any, at the new location.



**Note:** Three weeks before signing the lease, notify furniture and design partners to initiate the tenant improvement process.

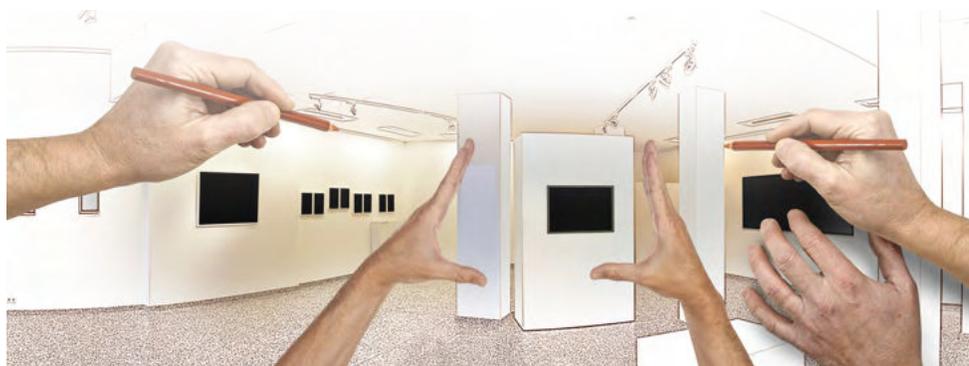


## Drawing up the Designs

- **360-172** Now it's time to take those indicative designs and produce a full layout (desks, meeting rooms, kitchens, common room, IT, air conditioning and heating).
- **360-173** Put together some mood boards – what look and feel are you going for?
- **360-174** Agree on a color scheme that reflects your brand and identity.
- **360-175** Make sure your designs are compliant with all regulations (particularly the DDA, and the Workplace Health, Safety & Welfare Regulations 1992).
- **360-176** Arrange for 3D walk-throughs, if you can (it can be difficult to visualize the end result from a plan).
- **360-177** Is it possible to build sustainability into the designs? Will the office be energy efficient?



**Note:** Discuss ergonomics with your furniture company.





## Finding the Right Furniture

It's not just about cost. There are things like health & safety and ergonomics to think about.

- 360-178** Is your furniture practical, for everyday work?
- 360-179** Are your chairs ergonomically efficient?
- 360-180** Is everything covered by warranty? What do warranties state?
- 360-181** Is it made from sustainable materials?
- 360-182** What will it cost to deliver and assemble?
- 360-183** Do you have enough storage?
- 360-184** Are you getting good quality for your money? The cheapest option isn't always the best in the long run. Can you buy reconditioned furniture?
- 360-185** Would you be better off renting, rather than buying?
- 360-186** Will your furniture work well with all of your technology and other kinds of equipment? (i.e. articulation areas)
- 360-187** Does the style suit your identity?



 **Note:** Find a furniture expert! A company that understands all aspects of new and used furniture to ensure moving service is done right. Can they relocate furniture as part of the deal?



## Furniture Specifics

Furniture selection and furniture decommissioning is a significant piece of the BT-360 solution. Therefore, from experience we are breaking down that function more specifically.

- 360-188** Contact BT360 as early as 12 months prior to your lease termination date to discuss the value of your current furniture and technology assets.
- 360-189** Financially, with the BT360 solution, you can earn valuable dollars and credits toward your furniture solution for your new space.
- 360-190** The reality of depreciated furniture is that if you try to liquidate or sell it to a third party buyer, you have to state a gain on the sale.
- 360-191** Alternatively, when partnering with a furniture company who has the means to repurpose or reuse it, you can save yourself valuable time and money by using the furniture value for trade allowances.

## Furniture Specifics continued...

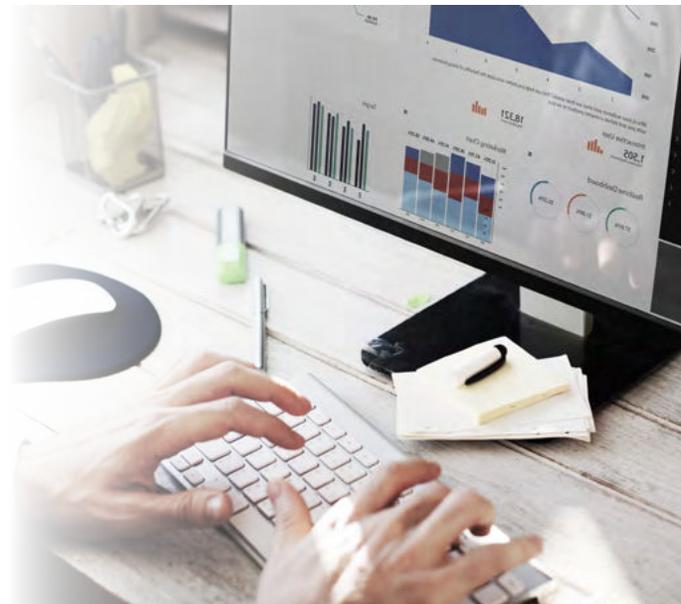
- 360-192** The reason most used furniture is obsolete includes lack of available parts, series and furniture is made to fit into the space designed for.
- 360-193** Furniture typically requires a 6-8-week delivery window, depending on time of year, logistics, and approval process for company ordering furniture.
- 360-194** BT360 offers a thorough inventory and space plan for marketing the assets for the year prior to your move/lease termination.
- 360-195** Designing a space and space planning can take 3-5 meetings to ensure all leadership parties agree on the layout, design and seating placement.
- 360-196** BT360 is very experienced at negotiating tenant improvement dollars from landlords in the new building. We recommend you obtain furniture budgets early (12 months) to negotiate tenant improvement dollars.
- 360-197** There are thousands of furniture solutions to consider, however, with a seasoned and experienced project manager/dealership, it can be easy and time efficient and save you thousands of dollars on your project.

 **Note:** BT360 manages projects, which include furniture relocation and exiting space decommission process.

## IT, Data and Computers

What sort of systems are already in place? Will all your equipment work properly?

- 360-198** Power points – how many and where?
- 360-199** Floor boxes/data points – how many and where?
- 360-200** Printers and fax machines
- 360-201** Common room/cabinets
- 360-202** Cabling – Is the voice and data cabling usable and current?
- 360-203** Backup generator
- 360-204** Servers
- 360-205** Service and support
- 360-206** IT management and coordination – who will manage this?



## Telephones and Internet

- 360-207** Order your telephone connections from your telephone supplier as soon as possible.
- 360-208** Assess your current set-up (the pros and cons).
- 360-209** Shop around for telephone providers and packages.
- 360-210** How many lines do you need?
- 360-211** Could an internet-based system (VOIP) be better?
- 360-212** Can you keep your current phone numbers?
- 360-213** Do you need voicemail, or a call answering service?
- 360-214** How will you let people know about your new numbers (mail-out, call forwarding)?
- 360-215** Don't forget the basics – do you have enough handsets?



 **Note:** Technology requires an expert who understands all aspects of connectivity and communication. BT360 can provide expert partners.

## Health & Safety

Health and safety is of paramount importance because you are responsible, even if you hire contractors. Make sure you work with companies with excellent health and safety credentials and processes, as well as workers compensation and adequate liability protection.

- 360-216** Ask your appointed general contractor to provide you with health and safety assistance.
- 360-217** Get someone to check out any health and safety file that may exist for your chosen building, and make sure it's up to date.
- 360-218** Consider what arrangements you'd like contractors coming into your new premises to comply with.
- 360-219** Parking? (special needs spaces, etc.)
- 360-220** Access to your space?
- 360-221** Restrooms on your floor or in your space.

 **Relocation Tip:** Try to hire a contractor with an in-house health and safety team, to ensure they understand needed improvements.

- 360-222** Verify HVAC provides proper ventilation and air quality.
- 360-223** When vetting contractors, ensure there are no language barriers when communicating on critical safety issues.



## Client & Partner Communication

- 360-224** Make sure all clients and suppliers know where and when you're moving.
- 360-225** Send out a letter or open house invitation.
- 360-226** Send out an email.
- 360-227** Schedule an update to your company website.
- 360-228** Schedule reprints of company stationery and forms.



**Relocation Tip:** By law, you are required to keep a record of any waste that leaves the site. You are also responsible if one of your contractors doesn't dispose of waste properly (like dumping paint down the sewer drain). So, make sure your contractor has excellent environmental credentials. Create a waste critical checklist.



## Work on Site

- 360-229** Ensure environmental compliance.
- 360-230** Recycle any plasterboard, carpet and other materials being decommissioned.
- 360-231** Separate waste so as little waste as possible goes to landfill.
- 360-232** Follow the proper procedures to dispose of hazardous materials.
- 360-233** Look into making your fit-out carbon neutral. You can now offset any carbon emissions from the work on your site. Talk to your design and fit-out contractor about the options.
- 360-234** Run weekly meetings, on site.
- 360-235** Keep track of progress with your project manager.
- 360-236** Make sure there is a sign-off.
- 360-237** Make sure there is a procedure for any changes.
- 360-238** Take photos of the work at every stage, and make notes of any defects.



## Planning the Move

- **360-239** Inventory all contents being moved to identify the scope of the work for each discipline, including movers, IT infrastructure, technology disconnect and reconnect, telecom system replacement or relocation, copier services, etc.
- **360-240** Identify clearly what is being moved and what will not be moved, for both company and employee owned property.
- **360-241** Identify concurrent management or structure changes, technology infrastructure and software changes, equipment replacement plans and any other changes the company is contemplating during the two months prior to and two months after the scheduled move date.
- **360-242** 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 contents.
- **360-243** Once the objectives are established, the inventory of contents completed, and schedule constraints are clear, write a comprehensive plan for each discipline (movers, technology, etc.) that quantifies the scope of work clearly and describes the selection criteria.
- **360-244** Talk to your IT specialists about the transition (they may need time for testing).
- **360-245** Put someone in charge of managing the packing and de-clutter process.
- **360-246** Make arrangements with your removal company.
- **360-247** Check your new office is fully secure for when things start arriving.
- **360-248** Arrange all the crates and labels for packing up.
- **360-249** Coordinate any holidays, making sure all the key people are available.
- **360-250** Make sure all your staff know what's happening (when to clear their desks, what to tell clients, when to move, etc.) – they may need reminding.
- **360-251** Send out an internal newsletter with key dates for the staff.
- **360-252** Arrange to have someone on-hand on the day, to help deal with snags or last-minute problems.
- **360-253** Put proper security in place – at old site, and at the new site (things could go missing amongst all the confusion).



 **Note:** BT360 recommends vetting every employee or contractor who will be on site during the space rehab and moving process.

## De-clutter and Getting Rid of Old Equipment

There's no point paying to move anything you're not going to need.

- 360-254** Get rid of any unnecessary clutter.
- 360-255** Clear out old files.
- 360-256** Scan documents you don't need as a hard copy.
- 360-257** Dispose of any information securely (shredding, etc.).
- 360-258** Donate any unwanted furniture, computers, appliances, etc., to charity.
- 360-259** Have plenty of extra bins and recycling points set up (it makes it easier for staff to clear out as well as encouraging recycling).
- 360-260** Arrange for the removal of all rubbish.

## De-snagging and New Office Preparation

- 360-261** Look for snags (schedule a thorough walkthrough with your contractor).
- 360-262** Clean-up on site.
- 360-263** Thoroughly test everything – phones, computers, lights – one non-working handset can ruin your day.
- 360-264** Final handover
- 360-265** Arrange supermarket delivery to the new office – tea, coffee, champagne?

## Celebrating Success

- 360-266** Arrange a move-in party for staff and/or clients.
- 360-267** Take that long deserved holiday.

