

## **Sample Commercial Relocation Time Line**

### **J. D. Carton & Son, Inc.**

- I. One year prior to lease expiration date
  - a. Hire commercial real estate professional.
  - b. Begin to explore all options for future office location.
  - c. Create budgets for:
    1. Technology requirements for the new office.
    2. Furniture for the new office.
    3. Phone requirements for the new office.
- II. Nine months prior to move.
  - a. Hire architect and space planner and begin planning new office layout.
  - b. Define file space requirements on a department level, office level and individual level. Review archive standards or create policy (call J. D. Carton & Son, Inc. 800-222-0660)
  - c. Interview owners representation firms, construction firms and other contractors.
  - d. Create a master task list.
  - e. Contact building owners at both the old and new facilities and get their insurance certificate requirements.
  - f. Build a database of employee names including department, phone number, data address, computer setup, e-mail and special requirements.
  - g. Build database for servers and network printers. This is also a good place to list copiers and fax machines.
- III. Six months prior to move
  - a. Finalize new furniture decisions and place order.
  - b. Plan for the disposal of old and unwanted furniture.
  - c. Finalize phone system and carrier. Place order.
  - d. Order flooring and special wall treatments for new office.
  - e. Communicate to employees and select “move captains” or people who will administer the relocation plan.
  - f. Begin to plan a booklet of information about the new office. Information you can include is building access info, security info, local restaurants, reinforce company policies, new phone number listing and other helpful information.
  - g. Review office procedures relating to files that require special handling and security. Create packing and moving procedures for these files keeping in mind the Sarbanes-Oxley and HIPAA regulations.
  - h. Create a list of items that are determined to be of high value. This could be anything from artwork to antiques to specialty electronic equipment. Work with moving contractor to create a plan on how to pack and move these items. Lap top computers should be a part of this plan even though they are not usually considered high value.
  - i. Talk to your insurance provider about coverage during the relocation. Determine if additional coverage is required.
- IV. Three months prior to move.

- a. Interview and hire moving company. Call J. D. Carton & Son, Inc. 800-222-0660.
  - b. Assign new office locations.
  - c. Meet with move captains and assign responsibilities.
  - d. Create relocation plan and schedule, with moving contractor. Review label system.
  - e. Add move label system numeric and color code information to database.
  - f. Schedule move with building management at both the old and new facilities. Reserve elevators for move.
  - g. Plan purge campaign and schedule recycling. Call J. D. Carton & Son, Inc. about archive planning and record storage.
  - h. Review lease and service contracts on electronic equipment and determine who is responsible for moving the units. Add this info to database and schedule servicing of the equipment.
- V. One-month prior to move.
- a. Have the first of three purge days to reduce file contents.
  - b. Schedule pick up of record storage boxes.
  - c. Move captains to meet with moving contractor and their supervisors.
  - d. Make sure mover has filed their Certificate of Insurance with building management.
  - e. Review all vendor schedules at both buildings and resolve delivery / removal conflicts.
  - f. Contact insurance companies and schedule transfer of coverage.
  - g. Contact service providers and other vendors about change of address.
  - h. Have construction company give you a building inspection schedule for all final inspections by the town officials. Check status of certificate of occupancy on a daily basis.
  - i. Check with building management of potential issues with elevators and security. Get after hour contacts and find out response times in case of problems. Look into having an elevator mechanic onsite during move hours.
  - j. Schedule cleaning for new and old office space for after the move.
  - k. Plan on whom and how your company will deal with post move issues regarding data, computers, phone, furniture and moving. Set up a temporary help desk to cover these issues.
- VI. Two weeks prior to move.
- a. Have the second of three purge days.
  - b. Identify employee with special needs for move.
  - c. Review and re communicate to employee packing and tagging requirements.
  - d. Publish and distribute booklet on new facility and service options in the area.
  - e. Confirm relocation schedule with all vendors.
  - f. Receive first of two deliveries of packing material from moving company.

- VII. One week before move.
  - a. Begin to pack non-critical areas.
  - b. Tag all furniture and technology equipment.
  - c. Final material delivery from moving vendor.
  - d. Start punch list for construction contractor and new furniture vendor.
  
- VIII. One or Two days before move,
  - a. Schedule inspection and note existing building damage with mover supervisor.
  - b. Complete all packing and perform pre-moves.
  - c. Complete punch list for construction and furniture vendor.
  - d. Have new office area placarded by moving vendor for use by the movers, data / IT vendors and phone vendor.
  - e. Install building protection for all moving activity. (This also can be done prior to new furniture delivery)
  - f. During the final packing emphasize the purge campaign (third of three). Do not bring your old and out dated business papers to the new office.
  
- IX. Moving Day
  - a. Move captains are to make sure all common area and individual packing is complete. Make sure everything has been properly labeled.
  - b. Make sure all sensitive data has been backed up to tape or disc.
  - c. Prepare all computers, copiers, fax and other electronic equipment for moving.
  - d. Turn the relocation to the movers and stay out of the way. During the move the employee should go home taking any personal belongings with them. Only the move captains should be present during moving activity.
  - e. Near the end of the move do a final walk through with move supervisor to make sure everything has been taken. In the new building do a walk through to make sure everything was placed where you planned.
  - f. Set up help desk.
  
- X. After the move
  - a. Remove moving boxes and complete unpacking.
  - b. Resolve issues as reported to help desk.
  - c. Perform training for phone, security and new office procedures.
  - d. Make decisions about artwork and plant placement.
  - e. If you moved in under a Temporary Certificate of Occupancy you need to schedule final inspections to get the full CO. Complete all construction and furniture punch list items.