

RELOCATION CHECKLIST

(Tenant improvement only, not for ground-up)

Relocating your company doesn't have to mean a loss of productivity, revenue, sleep, or sanity. Our role at Pivotal Project Management is to plan, manage, and execute a custom relocation program that meets your schedule and budget demands.

Below is an introductory relocation checklist to help you begin planning and organizing your company's move. Please note this is merely an outline of the upcoming steps and procedures to consider and some projects may take more (or less) time to execute. Contact us for a personalized consultation that more accurately represents your specific situation.

6-12 MONTHS BEFORE MOVE:

- Develop a comprehensive move plan to include vendors and scopes of work. Select an architect/interiors firm. Collect references from experienced and trusted vendors. Engage a General Contractor if applicable for tenant improvements. Establish program budget(s) and schedule(s).
- Finalize lease and site selection and execute contract documents. Work with your selected architects and interiors firms to develop space plan and construction documents if applicable.

5 MONTHS BEFORE MOVE:

- Finalize design and construction documents with GC. Inventory furniture, IT equipment, production equipment, etc. for: 1) liquidation 2) relocation 3) replacement/disposal. Coordinate receive/install schedules with GC work. Produce low-voltage cabling plan-contract LV vendor for install and coord. with GC work.
- Next, begin demolition and/or new construction. Finalize suppliers for new furniture and IT equipment. Review origin lease document to determine building move out policies and lease-exit condition requirements

4 MONTHS BEFORE MOVE:

- Collect referrals for 3-4 vendors for each of the following services: Mover, Furniture Team, Server Disconnect/Reconnect, PC Disconnect/Reconnect, Phone system transfer, Hang Team for whiteboards/art/TV's/etc., Voice and Data Cabling, Access Control/Key Card, Alarm & Monitoring, Surveillance Systems, and other vendors associated with your specific needs.
- Create a cabling plan and confirm new space plan accommodates furniture and cabling plans.

- Schedule a time to walk each vendor through the space, address move details, and to obtain bids. Review bids and qualifications, compare pricing, and finalize vendor selection and contracting.

3 MONTHS BEFORE MOVE:

- Review and finalize the move plan with your Pivotal project manager. Use correspondence to notify origin and destination property management of move dates. Ensure you're aware of all building elevators and entry/exit needs. Place all orders for new furniture and IT equipment.

8 WEEKS BEFORE MOVE:

- Assign department heads within your organization to review critical and time sensitive move plan segments. Create purge plan and secure document shredding protocol – schedule purge events with internal teams.
- Confirm furniture delivery and installation management with selected vendors. Plan exclusive use of elevator(s) and entry/exits with origin and destination property management. Confirm equipment move schedules with utility providers, security, furniture, and IT equipment.

6 WEEKS BEFORE MOVE:

- Select and assign move coordinators for each department. Schedule employees for move coordination training and kick-off meetings. Outline and schedule employee packing requirements, computer/PC requirements, and move responsibility meetings.

5 WEEKS BEFORE MOVE:

- Order new address mailing cards, business cards, new letterhead, and envelopes with the new address. Contact U.S. Post Office and obtain change of address documents. Ensure you have the capability to alter these addresses online as well. Contact recurring service providers and inform them of new delivery/service address timing.

4 WEEKS BEFORE MOVE:

- Finalize your move plan schedule with selected vendors, suppliers, and property management. Confirm, again, in writing, all elevator and access requirements and commitments with suppliers and property management. Finalize security card access requirements for new location.
- Create employee move handbook and/or move procedures handout. Finalize all PC, printer, fax, copier locations and extensions. Double check locations against electrical floor plans. Mail new address announcement cards to clients and suppliers.
- Create a floor plan with move label numbers assigned to each person on your team and assign each individual area. Confirm removal schedule of unneeded furniture identified for liquidation.

3 WEEKS BEFORE MOVE:

- Review progress of new furniture delivery and confirm schedules with vendors. Create schedules for specific move coordinator assignments per day and per location. Distribute them to the move coordinators within your organization.

2 WEEKS BEFORE MOVE:

- Define “lost and found” area in each major destination area and ensure the team is aware. Complete installation of new furniture. Punch-list all new furniture. Hold employee move orientation meetings with move coordinators. Review entire move plan and go over all labeled and area colored floor plans with everyone moving. Provide moving crate use training. Finalize transition plan for IT and telephone system needs.

1 WEEK BEFORE MOVE:

- Review crate, box, and packing material delivery. Review final punch list for facility with construction manager and/or general contractor. Move coordinators should meet and review move responsibilities and area label assignments with all corresponding department personnel. Post all label and color code directional signage at the destination facility.

MOVE DAY:

- Walk through origin and destination space with each vendor identifying any pre-existing damage to the facility. Station personnel in their assigned areas at origin and destination to provide direction and answer any questions that arise. Manage issues with vendors and suppliers throughout the move process. At the end of move, walk through origin and ensure that all labeled items have been retrieved. Begin decommissioning process at origin.

DAY AFTER MOVE:

- Address issues that arise as employees arrive, make adjustments that will make your team happier and more comfortable with their new surroundings. Make a complete list of any move-related damages to property or to facility. Provide list to relocation manager or team leads to sort and address.

Seem a Little Overwhelming?

It doesn't have to be. Pivotal Project Management is here to help with all the logistics, planning, and implementation. Our experienced team is 100% invested in the success of your relocation and will ensure your move goes smoothly. We have extensive knowledge and connections when it comes to vendor assignment and relocation management. Let us do the heavy lifting for you. Get your company back up and running with as little downtime and lost revenue as possible.

Contact us at Info@pivotalstrength.com

Or give us a call at **720-399-9400**