



This document is a tool you can use to help organize and adhere to a plan for your office move.

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## Managing Your Move

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Project management is a mixture of people, systems and techniques used to complete a project successfully. A key element is doing the right thing at the right time.

It is not enough to be busy – the question is,  
What are we busy about?  
Henry David Thoreau

The check list and activity cards form a basic project management system. These activities are common to all corporate moves. As such, they provide a framework to plan, organize and manage your move. In your planning process other tasks and sub-tasks will become apparent. Add these new tasks to the check list and blank activity cards provided.

### Project Scheduling

Enter the pertinent tasks from the activities check list to the master relocation schedule. Establish a “lead time” for each task. Beside each task enter the “lead time” as a horizontal bar. The bar’s length represents the time in weeks needed to complete this task. By analyzing the schedule you can figure out the shortest possible time for your move.

### Who’s Doing What

To assign a task, give the corresponding card to a member of your move committee. Place the assigned person’s name in the “assigned to” column and its scheduled completion date in the “due” column of the check list. The activity cards have a “note pad” for important names, phone numbers and notes. When the committee member completes the task, the card is returned. Enter the completion date on the check list.

### Keeping on Course

The activities check list becomes a milestone chart when the scheduled completion dates are entered. A quick review of the check list will tell you if a task is completed or not, and who is responsible.

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Activities Checklist	Assigned to	Due	Done
1. Form a move committee.	_____	_____	_____
2. Set your moving budget.	_____	_____	_____
3. Delegate and assign responsibilities to each member of the move committee. Use activity cards.	_____	_____	_____
4. Find out if any licenses or permits are required at new facilities.	_____	_____	_____
5. Determine if you will move over a weekend or after regular hours to avoid interruptions of business.	_____	_____	_____
6. Make a detailed list of all floors and departments in the order they will be moved from the old facilities. Decide which departments should be in operation at the destination first.	_____	_____	_____
7. Select Department Move Coordinators.	_____	_____	_____
8. Develop a master relocation project schedule with milestones.	_____	_____	_____
9. Inventory all furniture, equipment and contents. Note size and if disassembly is needed. Survey contents for the number of cartons needed. Identify items such as paintings and sculpture that may need special handling.	_____	_____	_____
10. Decide which furniture and equipment to keep, and which to sell. Photograph what you keep and that will be moved. Keep photos in an album to prove any claims for damage made during the move.	_____	_____	_____
11. Check all computers, copiers, word processors, and equipment for the proper preparation for moving. Verify if using your mover will void any warranties or service contracts.	_____	_____	_____
12. Determine if there are going to be any moves done before the main move, or if the move will be broken down into phases.	_____	_____	_____

Activities Checklist	Assigned to	Due	Done
13. Check doorways, corridors, elevators, stairwells and loading docks at both locations for ease of egress and entry. Confirm the weight the elevators can lift.	_____	_____	_____
14. Confirm building policies and procedures at both locations. Also clarify labor policies at new location, and any move-in restrictions.	_____	_____	_____
15. Decide on security procedures for the move. Figure out how to confirm that everything removed from all locations arrived at the new location. Consider supplying identity badges to vendors, movers, and your employees.	_____	_____	_____
16. Check for adequate parking facilities at both locations and make arrangements, when necessary, with police or traffic departments.	_____	_____	_____
17. Schedule the refurbishing of existing furniture and equipment. Allow enough time for the refurbishment and its on-time delivery to the new facilities.	_____	_____	_____
18. Clarify who is to do the packing: your employees, the mover, or what combination. Be very specific on who, what, when, and how people are to handle the contents of desks, pictures, plants, etc.	_____	_____	_____
19. Develop an action plan for the move to minimize business disruption.	_____	_____	_____
20. Plan for gifts or cash payments, as necessary, to appropriate people, for expediting difficult tasks.	_____	_____	_____
21. Explain move to key executives.	_____	_____	_____
22. Develop Request For Proposal package.	_____	_____	_____
23. Collect and analyze the movers' estimates.	_____	_____	_____



Activities Checklist	Assigned to	Due	Done
24. Select an appropriate mover.	_____	_____	_____
25. Check the insurance costs from moving company.	_____	_____	_____
26. Check adequacy of your existing insurance coverage for the move. Review your policies to make sure all of your business equipment, appliances, and furniture are covered before, during and after the move. Update policies if necessary.	_____	_____	_____
27. Get Certificates of Insurance from the mover's insurance company.	_____	_____	_____
28. Confirm delivery damage claims procedures.	_____	_____	_____
29. Arrange for the touch-up and repair of any items damaged in the move. Get advance approval of repair service from the mover.	_____	_____	_____
30. Arrange for telephone trunk lines at new location, if required.	_____	_____	_____
31. Get estimates for telephone system and its installation at new location.	_____	_____	_____
32. Select telephone system for new location.	_____	_____	_____
33. Obtain telephone number(s) for the new location. This should be done as early as possible, so that the listing in "this year's" telephone directory and Yellow Pages will be correct.	_____	_____	_____
34. Make sure telephone company will install a recording on your old phone number that gives out your new number. Insist that the recording must be in place for at least six (6) months. Confirm in 2 weeks.	_____	_____	_____

Activities Checklist	Assigned to	Due	Done
35. Order telephone equipment.	_____	_____	_____
36. Schedule telephone installers on a standby basis to take care of any last minute changes quickly, so that communications can be in operation when the offices open for business.	_____	_____	_____
37. Buy new office furniture.	_____	_____	_____
38. Arrange to sell or discard obsolete furniture and equipment. Find buyers, or donate to charity for tax deduction.	_____	_____	_____
39. File change of address forms with post office for every person who receives mail at the office. The post office will forward your mail for one year.	_____	_____	_____
40. Notify banks, clients, insurance, IRS, services, software vendors, subscriptions, etc. of new address and phone number. Allow 6-8 weeks for companies and subscriptions to update their records. Make up a master list for follow-up.	_____	_____	_____
41. Notify vendors of your new address and when their products will be accepted and received at new location.	_____	_____	_____
42. Arrange for listing on lobby directory of new building. Allow 6-8 weeks.	_____	_____	_____
43. Schedule public relations effort, including plans for news releases, articles, "office warming" parties, etc.	_____	_____	_____
44. Develop a cost effective way to make the transition from the old stationery and forms to the new, without running out of the old, but also without having to throw much away.	_____	_____	_____
45. Place an order for new stationery using new address, subject to conformation of new telephone number.	_____	_____	_____

Activities Checklist	Assigned to	Due	Done
46. Confirm that new letterhead, envelopes, and business cards are printed when new information is absolutely certain.	_____	_____	_____
47. Purge existing files and storerooms before the move. Send closed files to off-site storage.	_____	_____	_____
48. Explain move to all employees in meetings and memos. Delegate and clarify all tasks and assignments. Use activity cards.	_____	_____	_____
49. Arrange for each department to have a floor plan of their area in the new facilities.	_____	_____	_____
50. Arrange a tour of the new facilities for department move coordinators.	_____	_____	_____
51. Arrange a tour of new facilities for key executives and department heads.	_____	_____	_____
52. Schedule training for security, fire and life safety procedures at the new facility.	_____	_____	_____
53. Schedule dates for the dismantling and reassembling of any equipment that needs to be moved before the actual move. This includes anything that requires more than the normal moving time for dismantling and reassembling.	_____	_____	_____
54. Arrange for plant service to remove and install plants at the new facilities. Remove plants before packing to give extra room to work. Install plants at new facilities after unpacking is completed.	_____	_____	_____
55. Decide the number and size of cartons needed per office, or per employee. Order cartons from your mover, or purchase from other source.	_____	_____	_____
56. Schedule distribution of packing equipment such as boxes and bins, and schedule the actual packing.	_____	_____	_____

Activities Checklist	Assigned to	Due	Done
57. Arrange for artwork, chalkboards, whiteboards, etc., to be taken off the walls at your old facilities. Arrange for their installation at the new facilities. Movers do not remove or install these types of items.	_____	_____	_____
58. Confirm that telephones at new address will be operating properly on or before move in day.	_____	_____	_____
59. Arrange to relocate your present security systems and procedures to your new facilities, or confirm the installation of new systems and procedures.	_____	_____	_____
60. Explain to each employee exactly what they will be required to do: remove contents from desks, pack books and files, color code boxes, etc.	_____	_____	_____
61. Code all furniture and equipment, on a color coded floor plan of the new facilities, to show where each item should be placed.	_____	_____	_____
62. All keys to desks, file cabinets, etc. should be wire-tagged and labeled and placed in a safe place. Tape keys to empty desks and file cabinets. Make sure you have duplicate keys.	_____	_____	_____
63. Mark, tag, and color code every item to be moved. Be sure to have photographs of each item that will be moved. Keep photos in an album to prove any claims for damage made during the move.	_____	_____	_____
64. Schedule elevator service in old and new location.	_____	_____	_____
65. Arrange with the building manager to have the air conditioning in operation during the move-in at both locations. Keep track of hours - you will be billed.	_____	_____	_____
66. Establish communications between old and new locations to help with move coordination. Telephones are the easiest.	_____	_____	_____
67. Schedule the delivery and installation of new furniture and equipment.	_____	_____	_____



Activities Checklist	Assigned to	Due	Done
68. Make sure all employees know what to do, and when and where to report to their new workstations when the new office opens for business.	_____	_____	_____
69. Install locks at new facilities and make duplicate keys. Distribute keys to appropriate employees.	_____	_____	_____
70. Arrange for the distribution of parking passes and security cards for the new facility. Maintain proper records for proper control and audit procedures.	_____	_____	_____
71. Develop “punch list” of items to be completed by the contractors or delivered and installed by suppliers.	_____	_____	_____
72. Confirm that the Certificate of Occupancy and any other required permits or licenses have been obtained.	_____	_____	_____
73. Reconfirm that telephones at new facilities will be operating properly on or before move in day.	_____	_____	_____
74. Arrange to feed your employees, if appropriate, during the move, or on delivery day, at the new location.	_____	_____	_____
75. Develop contingency plan for computer malfunction during and after move.	_____	_____	_____
76. Back up computer systems. Hand carry backup to new facilities.	_____	_____	_____
77. Protect elevator cabs, lobbies, walls, and floors against damage from moving.	_____	_____	_____
78. Someone should be available at the old facilities to answer questions and give directions to the movers. Record the start time of the move and the number of movers working on your move.	_____	_____	_____





Activities Checklist	Assigned to	Due	Done
79. Check inventory as contents are loaded into each moving van. Seal each van when full.	_____	_____	_____
80. After the last moving van is loaded, but before it leaves, walk through the facilities to search for anything left behind. Look in elevator lobbies, hallways and offices.	_____	_____	_____
81. Carefully read the bill of lading before you sign. It is the contract between you and the mover. Keep it with you until everything is delivered, charges are paid, and any claims are settled.	_____	_____	_____
82. Someone should be at the new facilities to answer questions and give instructions to the movers at the new location. Record what time the mover arrived and the number of movers working on your move.	_____	_____	_____
83. Examine seals on van and personally unseal.	_____	_____	_____
84. Put up directional signs, room and area labels, and furniture plans in the new facilities.	_____	_____	_____
85. A “Lost and Found” department should be set up to locate lost equipment, boxes, etc.	_____	_____	_____
86. Schedule staff for unpacking and stocking supply cabinets, storerooms and file rooms, and removing tags from all furniture and equipment, so your company will be operational as rapidly as possible after move.	_____	_____	_____
87. Schedule employees to put their desk in order and organize their work areas. Remove tags and labels from furniture and equipment.	_____	_____	_____
88. Arrange for cleaning after move has been completed; all boxes, cartons, bins, etc. , should be removed as soon as possible.	_____	_____	_____
89. Indicate on the mover’s inventory any damaged boxes or items before you sign anything. This is necessary to process any claims.	_____	_____	_____

Activities Checklist	Assigned to	Due	Done
90. Have a new phone list and map showing location of departments on each person's desk when the offices open for business.	_____	_____	_____
91. Transfer your insurance to the new location. Get Certificates of Insurance from your insurance company.	_____	_____	_____
92. Confirm that when you call your old telephone number, a recorded message or an operator gives out your new telephone number correctly.	_____	_____	_____
93. Reconfirm the termination of old leases and the return of security deposits.	_____	_____	_____
94. Confirm the proper completion, delivery, and installation of all items on both the construction and vendor punch list.	_____	_____	_____
95. Collect parking passes, security cards and keys for the old facility. Use a check list. Confirm the return of any deposits held by the landlord for these items.	_____	_____	_____
96. Arrange for the maintenance of the new facility. Establish housekeeping rules to prevent unwanted personal decorating.	_____	_____	_____
97. Audit final invoices against contracts and progress payments and pay retention.	_____	_____	_____
98. Complete and file all warranty information for all new furniture and equipment.	_____	_____	_____
99. Update fixed asset accounting system for any new furniture and equipment purchased. Do not forget to delete any old furniture and equipment sold or given to charity.	_____	_____	_____
100. Confirm the change of address corrections have been made. Use the master change of address list.	_____	_____	_____

Activities Checklist	Assigned to	Due	Done
101. Hold an office warming party, after things have settled down.	_____	_____	_____
102. _____ _____	_____	_____	_____
103. _____ _____	_____	_____	_____
104. _____ _____	_____	_____	_____
105. _____ _____	_____	_____	_____
106. _____ _____	_____	_____	_____
107. _____ _____	_____	_____	_____
108. _____ _____	_____	_____	_____
109. _____ _____	_____	_____	_____
110. _____ _____	_____	_____	_____
111. _____ _____	_____	_____	_____

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## Department Move Coordinator

Preparation is the difference between a successful move and total chaos. Most of your department's efforts for the upcoming move will be packing and labeling. As your department's move coordinator, you have three main areas of responsibility:

1. Communicating information about the move to your department's personnel.
2. Distributing employee move instructions, labels, getting extra boxes and answering questions.
3. Making sure boxes, furniture and equipment are correctly packed and labeled.

Because of this position, you are a key element in this move. During the preparation stages you will be working closely with your company's move committee as plans for the move are made. As such, you are an important source of information for both the move committee and your department.

### Communications

Small group meetings are useful for getting the word out. Have as many of these 10-15 person meetings as needed until everyone who is moving has attended. Do not limit attendance to these meetings; there is just too much information to pass on. Topics for these meetings may include:

**How the move will be handled.** – This would cover who will be responsible in your department for packing and preparing of files, personal items, computers, and other office equipment for the move. Be sure to discuss if any furniture must be disassembled and how that affects the schedule.

**Proper assembly & packing of moving boxes.** – While some boxes have instructions printed on them, a quick demonstration is worth three pages of instructions. If flap "2" does not make it into the slot in flap "1" during the rush of packing, the result will be a pile on the floor instead of a well packed box. This is also a good time to explain the correct way to pack and label boxes and that each employee should make a personal inventory of everything they pack. Discuss when the boxes will be available and how to get more boxes if needed.

**Pre-move housekeeping.** – This is a good time to clear out files and desks. Your company shouldn't pay to move files and items you don't need. Everybody should be asked, kidded, and cajoled to throw out unnecessary items. Disposal bins should be placed around your department to make it as easy as possible.

### Packing for the move

Your company will be responsible for anything your department packs. Your department's boxes must be properly packed so the moving company can safely move them. The movers will check your boxes and correct any problems they find and will charge your company for this time, so pack carefully. Except for the last-minute essentials, your department's packing should be done the day before the actual move.

Remember this tip on how to save space while packing. Place an empty box on the floor; pack the box, seal top, label and code. Place a second box on top of first and repeat the process. Stack the boxes only three high because of their weight. If one of these falls it could cause serious injury and damage.

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## Labeling Boxes, Furniture and Equipment

You will be supplied with a special set of floor plans and color coded labels. You'll notice that each workstation, office, bank of file cabinets, secretarial area, waiting room, library, and some individual items have a unique code number. This three or four digit number will identify where each item is to be placed in the new facilities. Please make it clear to everybody that all labeling is done by number, not by name. As move coordinator you will be responsible for completing and distributing these instructions to each department employee.

The color coded moving labels have places for the following information:

- \* Department name and section.
- \* Department number.
- \* Floor number. This is the floor you are moving to.
- \* Identification or Code number. This number must be the same as the number shown on the floor plans that the movers will use.
- \* Box number and total number of boxes for each person or area represented by this identification or code number.

Each floor at the destination will be subdivided into three or four color coded areas. These subdivisions keep the movers from retracing their steps during the move or moving things twice, which will add to your company's costs.

### Keys

All keys to desks, file cabinets, computers, etc. should be wire-tagged, labeled and put in a safe place. Items such as empty desks and storage cabinets that do not require security during the move can have a key taped to them. Make sure you have a duplicate of every key. Always have the key in your hands before closing anything that locks.

### Morale

The confusion and interruption of a move can be bad for employee morale if not handled with finesse. The process of moving: packing boxes, leaving the old facilities and moving into the new facilities is very dramatic, both physically and psychologically, to employees. All this activity tells people that the old is gone and there is something new to take its place. As a result, some people may experience confusion, anxiety, and a sense of loss.

For most people, the experience of moving is accompanied by a fear of the unknown. For some, it's no more than a mild concern. For others, this fear may be overwhelming and can lead to uncooperative behavior or a refusal to move.

Before a move, people are uncertain about their new working arrangements. Very often the cause of concern is the lack of detailed information about the move: where their offices will be located, what furniture and equipment they will get, and when everything will happen. Most simply want to know how everything fits together in the big picture. As department move coordinator you will be a major source of information. In this position you can directly affect your department's morale and productivity as employees spend time and energy trying to make sense of the move.



## Employee Moving Instructions

Employee Name \_\_\_\_\_ Label Color \_\_\_\_\_ Code Number \_\_\_\_\_

The bulk of your efforts for the upcoming move will be limited to packing and labeling. Proper packing will lessen the chance of damage and injury. Correct labeling will insure that each item will be put in the right place. You will be supplied with boxes, packing materials, and color coded moving labels; only use these labels. A coding system is used to identify each workstation, office, work area and some individual pieces of furniture during the move. Your moving address is the label color and code number shown above. The placement of office furniture, equipment and boxes is done by this label color and code number, not by your name.

Pack your boxes firmly but do not over pack them. The boxes are stacked during the move, so under-packed boxes may collapse when other boxes are stacked on top of them. Over-packing may cause a stack of boxes to topple. Pack the boxes with plenty of paper especially on the bottom to absorb the shock during transport. To make packing easier, place an empty box on the floor, fill the box, close top, label and code. Place second box on top of first and repeat the process. Stack the boxes only three high, because of their weight, 50 to 70 pounds, if one of these falls it could cause serious injury and damage.

To make unpacking easier, pack the least used items first and finish with the most often used items. So you know where to find everything when you arrive, make an inventory. The heaviest items should go on the bottom, then fill the box with lighter items. Wrap items with sharp corners and points before putting them into a box. Each box should contain only those items from one room or office. If a box has extra room, fill it with paper not items from another office or area. Place small loose items such as paper clips, rubber bands, etc. in envelopes and seal. Securely tighten the caps on all liquids. Be sure to check behind desks and file cabinets. Take irreplaceable, valuable personal items home with you until after the move.

Label every item to be moved. If an item such as a secretarial desk with return, has to be dismantled so it can be moved, tag all parts. Since boxes are stacked they must be labeled on the ends not on the top. The labels are designed to come off easily. Therefore, they will not stick to some surfaces. If necessary, place a piece of clear tape over the label.

**Desks and Credenzas** - Remove and pack contents in boxes. Place label on the top work surface.

**Glass Tops on Desks** – Place label on lower right hand corner, all papers from under the glass should be removed.

**Filing Cabinets** – Move pressure plates forward to secure the contents of vertical file cabinets. The contents of lateral file cabinets have to be packed in boxes. Place label in upper right hand corner of top drawer.

**Bookcases** – Place a label on either side or on the top. Books and contents should be removed and packed in boxes.

**Supply Cabinets** – Remove contents and pack in boxes. Place a label on the front near the upper right hand corner.

**Typewriters and Office Machines** – A special cart is used to move office equipment. Label typewriter on center of lid; for all other machines place the label on the top or in the front. Secure the typewriter carriage, if applicable, by placing both margin stops in the center. Unplug all cords. If cords are removable pack them in a box, if not, wrap cord around machine. Label dust covers, fold and pack in box.

**Personal Computers** – Back up data and “park” the heads on all hard drives. Unplug all cords and components then repack in original boxes if possible.

**Miscellaneous** – Do not forget to label chair, chair pad, waste baskets, etc.. Movers do not remove things from walls - detach from wall and label if it's to be moved. When in doubt about where to place the label, just make sure it is clearly visible. If you have any questions ask your department move coordinator.