



Pulling up the Roots: a Guide to Corporate Relocation

Overview

It is Monday morning and you look forward to starting the new week at work. As you get to your office, you find a note on your desk. Your boss wants to meet with you right away. You run down to your boss' office where you discover the company is going to be relocating to a new location. How do you respond when your boss asks you "What business disruption plans do we have for office relocations?"

A business relocation, whether it is a simple move in the same high rise building, or across the country, can be a major event. How you prepare for an upcoming relocation often determines how your employees adapt to their new environment and how quickly they can return to pre-move efficiency.

Use of outside resources

A relocation has a major impact on your business operations. An essential part of minimizing disruptions is the planning that takes place prior to the actual day of your move. Many companies assign an in-house relocation coordinator to perform these duties and oversee the relocation process. This person is typically assigned the responsibility of coordinating in-house efforts along with those duties performed by outside personnel.

One of the relocation coordinator's first duties will be to assemble a relocation team. The team members typically consist of both in-house and outside personnel. Companies may not be aware of everything that is required to "pull up your roots" and get situated in a new building. At first, the assumption is that except for a moving company, the company's in-house staff can handle an upcoming relocation. Many companies find they need additional help, but wait too long to bring in outside resources.

Outside resources have the staffing and experience to assist you on an as needed basis. Just as your company specializes in your products and services, there are companies that specialize in different aspects of the relocation process. Some do nothing but space planning, others may provide general relocation consulting, moving companies may provide the staffing to get you physically moved on the day of your relocation. You may also need storage companies to temporarily warehouse your furniture. These are only examples, so be prepared to use several outside companies to assist you with your office relocation.

Most companies know they will need help in transporting their furniture and equipment the day of the move. What they may not know is that moving and



storage companies need to get started well in advance of the actual move date. A coordinator will work with moving and storage companies describing the scope of work, timing and other logistical considerations. While some relocations are performed all at once, others occur in stages so as not to totally disrupt the operation of a business.

In addition to moving and storage companies, the relocation team may need the services of a technical staff that specializes in the relocation of Information Technology (IT) equipment. Relocation experts, space planners, and many others may need to be part of the relocation team.

The new offices may require construction work to be performed prior to occupancy. The relocation coordinator may need to be involved during the construction process to verify things are still on schedule. The relocation coordinator should also be available to answer questions concerning the new office environment.

Special considerations

At the beginning of the relocation process, a relocation coordinator may not be fully aware of the extent of Information Technology (IT) equipment that exists within a company. Information Technology (IT) systems and equipment are frequently a major area of concern and require special consideration. The following is not an all inclusive list but is provided as a sample of equipment that may need special attention:

- Computer equipment (servers, workstations, networks, laptops, hand held computing devices, printers, scanners, plotters, etc.)
- Communications equipment (telephone systems, voice mail, routers, switches, hubs, pagers, portable phones, etc.)
- Office equipment (fax machines, copiers, postage and shipping systems, time clocks, etc.)
- Other equipment (industry specific equipment, etc.)

Each of the above should be analyzed to determine the specific concerns for your company. Laptop computers, for example, may contain sensitive data and need to be carefully tracked so they are not misplaced.

Relocation coordinators typically use a five step process to relocate their company to a new location. As you review these steps detailed below, please keep in mind that unless you do moves on a regular basis, you may need outside resources to assist you with the relocation.

Step 1 – Plan the relocation

Through the use of checklists, office diagrams, floor plans, questionnaires and many other tools, the relocation coordinator identifies information to be collected and tasks to be performed.



Proper planning helps both in-house and outside relocation companies who are assisting in your relocation. Without such planning, people will not be as productive or efficient and your company may experience cost overruns.

The following are some of the items that should be evaluated and considered during your relocation:

- *Create a budget.* Consider all expenses including temporary furniture, outside resources, contingency, etc.
- *Confirm lead times.* Allow adequate lead times if ordering new furniture and equipment.
- *Office space.* Are you relocating from a larger office to a smaller one? Don't be surprised to hear "The modular furniture will allow us to get a smaller office."
- *Finalize locations.* Determine office locations for all employees according to the floor plans of the new site. Expect changes when you hear "I forgot to tell you we need room for three new hires."
- *Resources required.* Consider both your in-house staff as well as external companies. Keep asking questions "What do you mean the computers will have electrical problems if the employees are using space heaters in their offices?"
- *Timeframes.* Moves require more time than you originally allocated. Conduct fact finding and research, "We aren't allowed to use elevators to transport furniture during normal working hours?"
- *Be flexible.* Problems invariable come up and last minute changes are the rule rather than the exception. Planning will allow you to handle last minute disruptions, "Didn't I tell you the company president needs a new conference table in his office with a phone next to the table?"

Other resources available to the relocation coordinator include Contingency Planning & Management's (CPM) Buyer's Guide. This guide lists products, services, vendors and other sources that are available to assist in your relocation. The Buyer's Guide outlines key questions to ask vendors, buyer beware items, cost considerations and many other topics. In addition to the Buyer's Guide, CPM's web site <http://www.contingencyplanning.com> is also a good resource for the relocation coordinator.

The relocation coordinator should finalize the floor plans identifying the location of the employees and equipment. If possible, the relocation coordinator should set a cut off date for changes. Perform an inventory of all items to be relocated to the new offices. Selected furniture and equipment may not be relocated and may need to be disposed of or donated to charity. Create a checklist and tag any items that will not be relocated to the new offices.

Don't forget that a new business location will frequently require new telephone and fax numbers. This means new business cards, letterhead, envelopes, marketing materials, etc.



Review your new site as early as possible to minimize problems on the day of your move. If possible, the relocation coordinator should review the site during the site selection process. This allows the relocation coordinator to get an overview of the new site early in the process. It also provides management the opportunity to obtain the appropriate feedback if the company is trying to choose between two sites. One proposed site may appear to be sufficient, however it may require extensive, and costly, modifications to bring it up to your requirements.

If construction is necessary at your new site, work with the contractor during each step of the tenant improvements. Make yourself available to answer questions or ask to be notified if changes are necessary. Although you may not be able to initially answer the contractor's questions, it is better to be in the information loop than operating in the dark.

Step 2 – Prepare for the relocation

Now that you have planned, you need to start preparing for the relocation. Adequately preparing will help ensure proper handling, packaging, storage and transporting of your furniture and equipment.

Allocate time for a quality control review of your new site. Test the building wiring and cabling to determine everything is as planned. Create checklists and review small details. For example, review doors to determine if they swing out instead of in. A door swinging the wrong direction can cause major space planning problems. Simple mistakes can lead to big problems if they aren't caught early enough in the relocation cycle.

Using the checklist created in the Planning Step, the relocation coordinator should arrange to dispose of or donate furniture and equipment that does not need to be relocated to the new office. Disposing of items can frequently be done prior to your relocation and will be one less thing to worry about. Don't forget to plan for temporary furniture if needed.

Furniture and equipment you are relocating to the new offices require proper packing materials and other relocation supplies. The relocation coordinator should ask if sensitive IT equipment has special considerations.

Many companies plan to purchase new furniture and equipment as a part of the relocation. The relocation coordinator must take these acquisitions into account when preparing for the upcoming move. Make arrangements to coincide your furniture delivery with your move date.

Many companies upgrade their IT systems during a relocation. The approach is to purchase new computers for the new location instead of moving the old equipment. For the relocation coordinator, this is an especially challenging process. Many times company employees use their old equipment right up until



the day of the move. This leaves little time to transfer data and programs from the old computers to the new systems. Develop a systems transfer plan taking into account new equipment, staffing and other issues related to the IT equipment.

Prepare to use up your office supplies at your old location. No need to take old letterhead with an old address with you. Arrange for new office supplies to be delivered at your new location.

Notify your clients, vendors, and other business contacts of your new address. You don't want to miss a potential sale if a prospect can't locate you after your move. Identify small tasks that need to be performed such as arranging to have your telephone calls transferred to your new telephone number the day after your move.

Step 3 – Review new location

Why do you need to review the new location? Don't assume the new location is ready for occupancy. A wrong assumption can potentially be a big mistake.

Make sure you have a copy of the floor plans. As you do your site walkthrough, note any physical differences from the plans. One company relocated to a new office building then found that the rooms weren't the same size as shown on the floor plans. This was obviously a problem as last minute issues had to be handled the day of the move.

Another company experienced wiring problems. Once the computers were relocated to their new offices, they were connected to their network via the data lines in the wall. This was a new building and the electrical wires were crossed over to the computer data lines. When the computers were plugged in, they experienced a sudden jolt of electricity. This damaged the internal components of the computers and obviously presented problems for both the IT staff as well as the users of the computer systems.

Not everything needs to wait to be packed until the day before the move. Start packing any non-essential items. Some items (seasonal items, etc.) can be packed in advance. This leaves more time available to your staff during the critical days immediately before your move.

Step 4 – The week of the move

Obtain packing boxes and arrange for delivery prior to the date of the relocation. Some employees may be on vacation, sick, or otherwise unavailable to pack at the last minute. The relocation coordinator should verify that all non-essential items are packed and tagged.



Packing always takes longer than you expect. Plan on taking twice as long if you haven't moved in quite some time. Arrange for trash bins to dispose of unnecessary items.

The relocation coordinator should be on hand to provide guidance and answer last minute questions. Technical personnel should be available to handle and oversee the proper and orderly shutdown of IT equipment, packaging and transporting of critical systems.

At the new location, IT personnel should be available to handle new equipment acquisitions, upgrades and installations. They will also be required to unpack, correctly identify and assemble the necessary components in the correct order. Experienced personnel should perform the proper setup, placement and testing of equipment. User workstations typically cannot be installed until the proper furniture is in place.

The relocation coordinator should be made aware of any items that may have been damaged in shipment. Any issues in this area should be brought to the attention of the company that assisted in the transportation of your furniture and equipment.

Verify utilities are terminated at your old location. Many companies do not disconnect service until after the relocation. This ensures that any delays in relocating to the new office won't result in termination of power, telephone service, etc.

Step 5 – Follow-up

The move is completed, the staff is in their new offices and you still aren't done. As the employees start unpacking their boxes they are probably finding small, but important, changes that need to be performed.

Furniture may need to be relocated from one wall to another due to a glare from a window. Pictures may need to be hung on the walls. Printers may need to be relocated or re-oriented. Employees that had desktop computers may now end up with tower units. This may require keyboard, mouse and monitor extension cables. People that used to share offices may now be partnered with other employees. This may require changes in the telephone and voice mail systems.

The follow-up support you provide the day(s) after a move may be the most important of all. The goal is to assist employees in quickly adapting to their new environment. This may mean new parking permits, the use of new service providers for portable phones and pagers, etc.

Troubleshooting and problem solving are to be expected, so allocate the appropriate amount of in-house and external resources. This will be time and money well spent.



Summary

To minimize a business disruption, adequate planning and resources need to be assigned to the project. Use checklists and add details at each step of the relocation process.

A relocation is harder and takes longer than anticipated. Prepare ahead of time. Get the help you need. Be prepared for the unexpected. Problems will come up, but with adequate preparation, they can be kept to a minimum.

Once you are done with the relocation, you will still have some follow-up items. Update your contingency plans with your new site location, equipment, telephone numbers, new staffing and other important issues.

Checklist

- Assign a relocation coordinator
- Start planning as soon as possible
- Use both in-house and external resources
- Start your to do list adding detail as you go
- Review the new site and check wiring
- Do as much as possible ahead of time
- Be prepared for last minute changes
- Expect and allow for delays
- Provide follow-up support after relocation

Publication and Author Information

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