

✓ **Assess Your Relocation Needs**

What is the purpose of your relocation and what do you hope to gain from it? Only after this question is answered in depth will you be able to define your requirements and map out your relocation plan.

✓ **Create a Budget**

A relocation budget is a critical planning tool that will help you assess your costs and manage them throughout the process. Your relocation budget should include one-time expenses, such as move service, cabling, telephone hook-ups, staff relocation, furniture installation and costs to reprint stationery. The budget should also include your new operating expenses, including the new lease/mortgage amount.

✓ **Build a Relocation Team**

Select a relocation team that includes an individual who will function as your single point of contact to manage the relocation effort on a daily basis. The team should include people who will serve as team leaders to help facilitate different aspects of the move, such as the computer team leader will be responsible for assembling a team to label and pre-pack the computer equipment as well as unpack and arrange the equipment at the new location.

✓ **Select an Optimal Move Time**

If you have control over the time period in which the office relocation will occur, then use it to your advantage. Determine an optimal move time for the relocation by avoiding crunch times for big events, times of heavy administrative output or during a particularly heavy customer service period.

✓ **Establish Operational Goals**

A number of questions should be answered about how you want your new office to function. The answers will reveal your operational goals. Ask questions such as “How will the office space be utilized for staff offices and common areas?” Create solutions that will help you define your new needs for staffing, operating systems, administration, furnishings and communications.

✓ **Create a Master Relocation Schedule**

Creating a master schedule will not only help you plan the relocation, but it will also function as your roadmap to carry out the multitude of tasks involved with the effort. The schedule should include all tasks that need to be completed (and the steps leading up to them), the individual/team responsible for completing each task and the deadline. A good way to get started is to focus on key accomplishments, such as an operational telephone system, employees beginning work at the new office, and the computer network installed and functioning.

✓ **Determine Whether to Make Any Upgrades During the Process**

Is your business or association in need of any upgrades, such as furniture, computers or filing system? If so, then you should consider doing it during the relocation process. Why not purge your files or storage area from unneeded items prior to moving the materials to the new location? You could save money on moving costs and have a more useful system for the new office.

✓ **Create a Strategy to Minimize the Disruption to Customer Service**

In order to provide continuous customer service, a process must be developed so that the move will be seamless. Have a system in place so that calls, emails, faxes and correspondence are all handled with care and consistency throughout the process.

✓ **Create A Strategy for the Continuation of Daily Operations**

When relocating a business, there is bound to be some disruption to the daily operations. However, the disruption can be significantly reduced by having a detailed move plan for minimizing employee downtime, a capable relocation team to keep the process on track, and by quickly enacting the infrastructure and systems at the new office.