

# TDS Business Relocation Checklist



No one knows better than us that office relocation incorporates a lot of moving parts. Here at TDS, we've helped many companies relocate, from across the hall to across the country. At TDS Business it's our specialty to take care of your phone and internet systems during a move so that you can take care of your customers. We know that it's important to carefully plan your office move, so we've developed the following checklist to help you get organized and ensure your move goes smoothly.

Assignments & Due Dates	Due Date	Assigned To
<b>8-9 Months Prior to Move</b>		
<input type="checkbox"/> Select a move committee and choose a move leader		
<input type="checkbox"/> Set a move date		
<input type="checkbox"/> Establish a relocation budget		
<input type="checkbox"/> Inventory what you have and what is needed for the new location by department		
<input type="checkbox"/> Communicate the move to employees		
<input type="checkbox"/> Get facility requirements for each department		
<input type="checkbox"/> Begin looking for new office space		
<input type="checkbox"/> Negotiate with your current landlord		
<input type="checkbox"/> Determine the total number of employees moving		
<b>6-7 Months Prior to Move</b>		
<input type="checkbox"/> Choose your new office space and negotiate your lease		
<input type="checkbox"/> Identify major tenant improvement needs & start contracting		
<input type="checkbox"/> Inventory furniture and office machines		
<input type="checkbox"/> Inventory connectivity requirements		
<input type="checkbox"/> Communicate the move to employees		
<input type="checkbox"/> Evaluate server room and networking needs		
<input type="checkbox"/> Evaluate your phone system and order new phone numbers		
<input type="checkbox"/> Contact your utility company or companies to schedule connection and disconnection of service		
<b>4-5 Months Prior to Move</b>		
<input type="checkbox"/> Assign office space		
<input type="checkbox"/> Evaluate furniture and equipment needs		
<input type="checkbox"/> Revise your insurance policies		
<input type="checkbox"/> Hire a signage vendor and order signage		
<input type="checkbox"/> Order new stationery, business cards and marketing material, update your website		

<b>3 Months Prior to Move</b>		
<input type="checkbox"/> Obtain a qualified mover		
<input type="checkbox"/> Order phone forwarding		
<input type="checkbox"/> Consider power requirements		
<input type="checkbox"/> Hire a signage vendor and order signage		
<input type="checkbox"/> Coordinate common area equipment and appliance moves		
<b>2 Months Prior to Move</b>		
<input type="checkbox"/> Coordinate telephone installation		
<input type="checkbox"/> Coordinate internet installation		
<input type="checkbox"/> Develop a disaster recovery plan		
<input type="checkbox"/> Schedule weekly move coordination meetings		
<input type="checkbox"/> Identify IT de-installation & installation responsibilities		
<input type="checkbox"/> Develop preliminary move schedule		
<b>1 Month Prior to Move</b>		
<input type="checkbox"/> Notify your clients and vendors of change of address		
<input type="checkbox"/> Schedule packing material and label delivery		
<input type="checkbox"/> Contact the post office, bank, IRS, Franchise Tax Board, EDD, Secretary of State and insurance carrier for change of address		
<input type="checkbox"/> Assign new phone numbers and extensions		
<input type="checkbox"/> Install phone system and phone lines		
<input type="checkbox"/> Assign move numbers and labeling system		
<input type="checkbox"/> Create employee move packets and instructions on how to move		
<input type="checkbox"/> Take a video of all equipment		
<b>2 Weeks Prior to Move</b>		
<input type="checkbox"/> Finalize move schedule		
<input type="checkbox"/> Hold employee move orientation meeting		
<input type="checkbox"/> Schedule post move training		
<input type="checkbox"/> Schedule move day on site help		
<b>Move Week</b>		
<input type="checkbox"/> Backup your data		
<input type="checkbox"/> Pack common areas and workspaces		
<input type="checkbox"/> Tag and label workspaces and common areas in your new space		
<input type="checkbox"/> Mount 'You are here' floor plans and color-coding instructions		
<input type="checkbox"/> Prep building for move – surface protection, corner guards, etc.		
<input type="checkbox"/> Distribute new security ID cards and key entry badges		

### Move Day(s)

- Confirm on site help is available
- Complete walk through each day of move
- Test telephones and call forwarding
- Update website and social media profiles with new address

### Post Move Support

- Welcome employees
- Dispatch appropriate team(s) for post move support
- Prepare and submit claims
- Prepare move punch list and action items – coordinate with appropriate contractors
- Hold employee training
- Celebration Time!

## 8-9 Months Prior to Move

### Select a move committee and choose a move leader

It's crucial to first choose a leader to manage the move committee and oversee the move. A move committee is typically made of representatives from IT, Human Resources and Facilities/Operations. Assign each individual on the move committee to a specific area of the move.

### Set a move date

Considerations that go into determining your move day: seasonal downtimes, start and finish dates of major projects and weather conditions.

### Establish a relocation budget

Each move committee member is responsible for identifying key cost items that roll into a master budget managed by the leader. Include items such as: new lease deposit, design of new premises, upgrading equipment/furniture, updating IT and telecommunication technology, people costs for relocation, updating marketing materials and business communication materials, and lost revenue due to downtime.

### Inventory what you have and what is needed for the new location by department

Get rid of what you don't need and plan for what the future may hold. Consider things like growth within the organization, mergers or acquisitions.

### Communicate the move to employees

Notify the employees of the reasons behind the move, the move date and the potential locations of your new office space.

### Get facility requirements for each department

Gather a comprehensive list from each department of their requirements for your new office space. Prioritize the list into "must-have" and "nice-to-have" requirements.

### Begin looking for new office space

Contact commercial real estate companies to find properties that match the needs provided by the committee members. Narrow your focus down to a few locations based on your company's requirements. Each committee member should tour the potential spaces and provide a list of pros and cons of each.

### Negotiate with your current landlord

Negotiate release of the current lease with your landlord and confirm any special requirements (such as use of a freight elevator) for the move.

**Determine the total number of employees moving**

Consider if you will be downsizing as part of the move or hiring additional employees.

## 6-7 Months Prior to Move

**Choose your new office space and negotiate your lease**

Choose the location that serves the most important aspects of your business. Begin negotiations with your new landlord regarding lease pricing and any necessary remodeling and upgrade costs.

**Identify major tenant improvement needs & start contracting**

Discuss with the committee specific improvement requirements and solicit bids from a contractor or contractors. Set the contract schedule so that the necessary improvements are ready by move day.

**Inventory furniture and office machines**

Keep two lists, one for furniture and another for office equipment. Include everything that's not personal: desks, chairs, cabinets, artwork, lamps, tables, phones, computers, printers, monitors, copiers & appliances. Note the condition of each piece.

**Inventory connectivity requirements**

Evaluate the infrastructure at the new location to ensure it can support your communication platform – this could involve structural changes, updated cable installation, and confirming the availability of carrier services. For TDS availability, click here:

<http://www.tdsbusiness.com/our-locations>

**Evaluate server room and networking needs**

Inventory all IT equipment to assess whether it is adequate for your needs and suitable for the new environment. Determine what equipment is and isn't required in the new office. Confirm the internet speed in your new office well in advance with your ISP (see options <http://www.tdsbusiness.com/products/internet-and-security/dsl.aspx>), as it might influence your choice of the new office location. List any technology equipment that needs upgrading or replacing.

**Evaluate your phone system and order new phone numbers**

Confirm that your current phone system is suited for the new space in terms of the number of phones and phone lines needed. Evaluate your current phone system for the features you require and decide if it's time to consider an upgrade during the move. Choose how you will manage your call traffic such as through ISDN or VoIP. The service you select will depend on what service is available in your area, how much bandwidth you need, and your budget. Discuss which solution best suits your needs with a [TDS representative](#). Once you've determined the number of phone lines order new phone numbers or arrange to transfer existing numbers.

**Contact your utility company or companies to schedule connection and disconnection of service**

Contact your telecommunications and or data provider to schedule a cut-over date.

## 4-5 Months Prior to Move

**Assign office space**

Create an office map that maps all offices, cubes and common areas. Place each employee in a work space on the map.

**Evaluate furniture and equipment needs**

Once office space is assigned, plan where existing furniture and equipment will be placed and either order new furniture and equipment or decide what will be purged/sold.

**Revise your insurance policies**

Adjust your insurance to cover the move and update the policy for your new space. Ensure both premises are insured on the day of the move.

**Hire a signage vendor and order signage**

Find out the signage requirements and specifications of the new location and order signage so that it can be installed the week prior to the move.

**Order new stationery, business cards and marketing material, update your website**

Your existing marketing materials and website need to be updated to reflect your new location. Keep your website revisions in review until you're ready to make the switch.

### 3 Months Prior to Move

**Obtain a qualified mover**

Interview 2-4 companies for competitive quotes.

**Order phone forwarding**

If you aren't keeping your existing phone numbers, notify the phone company of your move and order phone forwarding.

**Consider power requirements**

Identify the power facilities needed for your new location. Items such as UPS specifications and facilities for redundant power will need to be considered. In the instance of extended power outages or interruptions it needs to be easy, efficient and effective to power your site. Work out where you will need power jacks, telephone & network cabling points.

**Coordinate common area equipment and appliance moves**

Provide vendors (coffee machine, copier, vending machines) with your move date and schedule pickup and delivery to your new location.

### 2 Months Prior to Move

**Coordinate telephone installation**

Coordinate the installation of phone service and required equipment at the new location. You should also coordinate the redirection of the services with your carrier (such as number portability). This redirection needs to be planned well in advance to ensure the carrier can complete it and you can avoid downtime.

**Coordinate internet installation**

Coordinate the installation of internet service and required equipment at the new location. Determine whether minimum requirements for the server room are met (electrical, cooling, dimensions and security). Confirm whether the new office supports structured cabling, if required. Not all buildings offer wireless networking so if wireless computing is a priority - be sure to confirm it's possible.

**Develop a disaster recovery plan**

Expect the best, but prepare for the worst. Develop a plan to minimize your risk for loss of power, data, and/or connectivity.

**Schedule weekly move coordination meetings**

Prepare and distribute weekly minutes & schedules.

**Identify IT de-installation & installation responsibilities**

Coordinate timing of de-installation of servers and desktop computers and installation of moved and/or new systems.

**Develop preliminary move schedule**

Working with your mover and move committee, develop a schedule.

### 1 Month Prior to Move

**Notify your clients and vendors of change of address**

Use the move as a marketing tool. Identify all clients and vendors that need to be notified and establish a communication plan for notifying clients of the change of address. Be sure to include your clients' accounting department on the list. Call key customers to explain the move. Start using the new address two weeks before the move on all outgoing mail.

**Schedule packing material and label delivery**

Meet with your moving company to decide how many boxes, crates and dollies your move will need. Have these materials delivered two weeks prior to the move.

**Contact the post office, bank, IRS, Franchise Tax Board, EDD, Secretary of State and insurance carrier for change of address**

Make sure your mail is forwarding to your new location.

**Assign new phone numbers and extensions**

Finalize order for business cards with the new phone numbers.

**Install phone system and phone lines**

Triple check all individual telephone numbers and their locations, including each fax, DDI, and any other special devices you have on your system

**Assign move numbers and labeling system**

Add the move numbers to the office map that you previously developed. Don't forget the common areas.

**Create employee move packets and instructions on how to move**

Prepare employee move packets to the new space with instructions on parking, building information and the move schedule. Hand out labels, have employees label everything in their workspace.

**Take a video of all equipment**

Walk through your current space and take video of the conditions of your equipment in case something is damaged during the move.

## 2 Weeks Prior to Move

**Finalize move schedule**

Gather any final move requirements or schedule changes from the move committee, finalize and distribute the schedule to the move team.

**Hold employee move orientation meeting**

Pass out the move packets. Communicate move timing, explain what is required by each employee including what and how to pack and how to label. Communicate what if anything they will be moving themselves. Identify a 'lost and found' at both the origin and destination and identify move command central – for mover and employee inquiries. Distribute contact lists for emergency/on site/on call lists.

**Schedule post move training**

If your new office includes a new IT or telecommunication system, schedule training to get your employees up to speed as soon as possible after the move. Include [webinars](#), product resource [guides](#) and other [resources](#) available from your provider.

**Schedule move day on site help**

By now you should have determined how much additional help you will need with the move and who will be helping. Confirm the times and whether they will meet you in the new office or the old office.

## Move Week

**Backup your data**

Make several backup copies of all company data systems including firewalls and servers. Either backup to the cloud, or arrange for copies of the backup to be stored at an off-site secure data center where it will not be affected by the move.

**Pack common areas and workspaces**

Begin packing common areas such as kitchens, reception, hallways and conference rooms first. At this time remove anything that will not be moving into storage, or set it aside for trash. Next have employees pack individual workspaces.

**Tag and label workspaces and common areas in your new space**

Using the coding system your moving company designates to label your new space. Ensure all wiring & data cables are labeled correctly and to which piece of equipment they belong.

**Mount ‘You are here’ floor plans and color-coding instructions**

Place the office maps in common areas and elevators.

**Prep building for move – surface protection, corner guards, etc.**

Your mover should provide you with supplies to protect your current and new office from move damage.

**Distribute new security ID cards and key entry badges**

Collect old keys and cards and distribute new ones.

**Disconnect services**

Disconnect services and technology equipment at the old office and ask staff for their full co-operation in shutting down all equipment properly before leaving on the final day.

## Move Day(s)

**Confirm on site help is available**

Confirm that any on site help that you’ve scheduled has arrived to coordinate the move both at origin and destination.

**Complete walk through each day of move**

Walk through the space once it’s cleared and the new space to take note of damage, if any.

**Check IT and computer systems**

Start all servers and test network capability and whether data has successfully migrated. Check incoming and outgoing emails and internet connections. Confirm that your [TDS service provider](#) is scheduled to be available the first day in your new office to assist staff with network connectivity or phone issues.

**Test telephones and call forwarding**

Confirm and test that all equipment is working appropriately from remote locations. Check all phone numbers and their locations, and test to confirm that the call forwarding is working.

**Update website and social media profiles with new address**

Make a list of all profiles that need to be updated, and update these on the day of the move since they can’t be updated ahead of time. Push website address revisions to your live website.

## Post Move Support

**Welcome employees**

Walk the new space and confirm that your employees have no issues from the move. Send an email to remind employees to unpack, and instruct them where to stack boxes and moving materials.

**Dispatch appropriate team(s) for post move support**

This team should hang white boards and artwork, plug in equipment, adjust chair heights, etc.

**Prepare and submit claims**

Submit claims of any damage found during the previous walk through, or any damage identified post move.

**Hold employee training**

As soon as possible, hold employee training of new phone or internet systems utilizing product resources. Sign up for TDS’ Tips & Tricks email series for additional information on your new phone system. For any additional “How-To” questions, you can also visit the TDS Customer Training and Support Center.

**Celebration Time!**

You’ve worked hard, celebrate your move with your employees and recognize the members of your move committee for their extra effort.