

FINEGOLD

COMMERCIAL REAL ESTATE



Business Move Checklist

Whether you hire a company or handle your business move in-house, your priority should be **staying organized**. Use this checklist to help plan your progress and to track important details of your office move.

24 Months Prior To Your Target Move Date:

- ❑ Contact an independent, licensed commercial real estate (“CRE”) Advisor and Broker who specializes in corporate real estate advisory services. To begin today, contact Finegold Commercial Real Estate and Partners, who has expert CRE advisors and partners who are standing by, and may be contacted via email. Email: Contact@FinegoldCRE.com
- ❑ There are many aspects to your future planned business move that should be determined with the assistance of an expert independent CRE Advisor.
- ❑ Obtain a copy of your existing lease and review it with your selected CRE Advisor to help determine important factors, such as, lease expiration specifics and other important dates. Often times, if you provide this lease to your commercial real estate advisor, they can help you determine other important aspects to consider in advance of a potential relocation or move.
- ❑ Many times, larger space users will require 24-36 months of planning. While smaller users may require less time, mergers and acquisitions (M&A) and other business conditions may not allow such advanced notice, and in such circumstances your CRE Advisor will help provide a strategy based on market conditions to help meet your “move” needs.
- ❑ If you fear you’ve waited too long, contact Finegold Commercial Real Estate and discuss your best options.



3+ Months Before the Move:



- Choose a move committee.
- Establish a preliminary relocation budget.
- Determine whether the move requires hiring a third-party move management consultant
- Coordinate moving of servers with your IT provider or support person.
- Contact your telephone provider to get new numbers or to port existing ones. Confirm your long-distance carrier or consider other options
- Determine if any equipment requires specialized or authorized vendors to move it. These pieces of equipment could include copiers, lab equipment, certain electronics, or manufacturing machinery.
- Check your current lease for restoration requirements/ conditions for returning the current space to your landlord. Schedule a meeting with the existing landlord to review these requirements.
- Contact your telecommunications/data provider to schedule a cut-over date
- Reserve the building elevator (existing for move-out, new for move-in).
- Order keys or access cards from the building.

3+ Months Before the Move:

- ❑ Contact the building landlord to confirm the location of signage. Hire a signage expert to plan, get approval for, and install new signage, if applicable.
- ❑ Hire a qualified moving company by interviewing 2-4 companies, depending on the size of the job.
- ❑ Order new letterhead, business cards, forms, and other printed marketing materials.
- ❑ Coordinate updates to your website, email signatures, and anyplace else where your address appears so the updates can be implemented on the day of your move.
- ❑ Notify your clients of change of address.
- ❑ Contact the post office, your bank, and vendors (coffee service, vending machines, etc.) for change of address.
- ❑ Contact the IRS, Franchise Tax Board, Secretary of State, and Employment Development Department for change of address.
- ❑ Inform your insurance providers of change of address and new office requirements. Get certificates of insurance for the landlord, and any entities required by the lease.



2 Months Before the Move:



- Coordinate IT and server move, desktop, and telco/PBX timelines with IT.
- Assemble a moving team with each department having a move liaison and schedule weekly coordination meetings.
- Collect all furniture layout plans and work with employees for their new spaces.
- Prepare a lab and/or IT equipment ID matrix for all equipment being moved (if applicable). Coordinate with users to review special equipment installation/compatibility requirements.
- Develop a preliminary move schedule.

1 Month Before the Move:

- Develop a labeling/tagging scheme and assign move numbers.
- Prepare floor plans/layouts.
- Discuss and agree on move insurance needs with your company
- Plan a public relations campaign with press releases to highlight the new location and / or ribbon cutting and/or office-warming party
- Coordinate with the new site to add your listing to lobby directory.
- Determine security procedures for the move
- Secure off-site storage location for old files.
- Fine-tune move schedule



2 Weeks Before the Move:



- Finalize move schedule.
- Conduct an employee move orientation meeting.
- Collect packing and label materials.
- Identify a "Move Point of Contact" for mover and employee inquiries.
- Establish channels for move team communication and protocol for change requests.
- Create a list of emergency contacts, cell phone numbers, and vendors (such as moving company, building management, utilities, telecommunications).
- Schedule on-site help for move day
- Select a cleaning vendor for post-move.

Move Week:

- If needed, get additional packing and labeling materials.
- Tag and label destination site using room numbers and equipment IDs.
- Distribute contact lists for emergency, on-site, and on-call rosters.
- Finalize all move flows and schedules and distribute to moving team.
- Prep new site for the move (place surface protection, corner guards, etc)
- Distribute security ID, card key, and entry badges.
- As close as possible to moving day—change locks and access codes at the new location.



Move Day(s):



- Assign origin and destination move liaisons
- Coordinate On-site help to handle move related questions
- Complete job walk each day of move to track progress, confirm the move is on schedule, and identify any goods or walls that might have been damaged during the move.
- Allocate keys or access cards for new location.

Post-Move Support



- Appoint a point person to support employee inquiries, manage inventory, and track maintenance tasks, survey damages, and prepare and submit reports.
- Direct appropriate team(s) for post-move set-up (such as hanging whiteboards, equipment fit-up, etc.).
- Distribute new contact list and layout of department locations.
- Collect all access items, including security cards, keys and parking passes for the old location and confirm the return of deposits held by the landlord.
- Prepare move punch list and action items. Coordinate with appropriate contractors to address all issues and track to completion.
- Review final invoices against contracts.

Need guidance in relocating your business?

Finegold Commercial Real Estate and Partners can help select a variety of vendors who can handle all aspects of making your new space fit your needs, and then moving your organization into it.

We're with you from beginning to end:

- Real estate planning
- Space design construction
- Installing security, telecom, and IT systems
- Implementing a sustainability strategy (including reducing energy usage and attaining LEED certification)
- Move-in day (the day you obtain your new keys or access badge at your new office).



Contact us:

San Francisco Office:

415-683-3209

Silicon Valley Office:

650-461-9109

East/North Bay Office (Mailing Address):

925-962-9900

Email

contact@finegoldcre.com

FINEGOLD
COMMERCIAL REAL ESTATE

www.finegoldcre.com