



Relocation Guide for Business

A guide to planning voice and data technology requirements for your new location.

Making the Most of Your Move

Much of what we do at Tele Data Solutions is to help both our new and existing customers leverage the latest voice and data technology to improve their business process flow and productivity. We focus on ways new technology can improve the customer experience and accommodate the needs of today's mobile workforce. Often, when a business is growing or expanding and moves into a new facility, it becomes more important than ever to determine how updating existing voice and data technology to accommodate a growing workforce can positively impact business operations and bottom line profitability.

Our **Relocation Guide for Business** provides helpful recommendations at each stage of your business move timeline. As with any major event, planning is key. To make the most of your move, we recommend that you take adequate time to select the vendors and service providers you can trust to meet deadlines and deliver flawless execution.

This staged timeline is an approximate guide, however, the earlier decisions are made, the easier it will be to coordinate with your vendors and service providers to plan and deliver on time. We've outlined 6 stages of the Move Process and included a detailed checklist at the end of this document to assist you in planning your move.

Stage 1: Making the Decision to Move

Making the decision to move can be the single most important decision a business owner can make. It's a significant investment and can both positively and negatively affect the business as well as the employees. To locate the best space, select a high-quality real estate broker who understands your business and operations and can deliver the most value.

If your current lease allows flexibility in your relocation timing, consider moving during the time of year when there is a natural slow-down in your business/operations or if there are natural fluctuations in your business. You may also want to avoid the cold of winter or the heat of summer when employees are on vacation—or vice versa. Regardless of when you move, the best advice is to make sure you have enough time to properly plan and execute your relocation.

New technology can allow workers to work effectively and securely from their homes. In fact, some studies show employees increase their productivity when working from home (not to mention increases in job satisfaction). In addition, technology can easily allow offices/workstations/areas to be easily shared between team members who are not always in the office. In short, advanced technology may allow you to rent, lease or purchase a much smaller office space.

Stage 2: Picking the Right Location

A great location with a poorly managed and maintained property is likely not a good fit. The same is likely true of a great location and well-maintained property with a building owner who is not on the same page as you. You are likely going to sign a 5-year or perhaps even a 10-year (or longer) lease, so be sure to take your time and do your due diligence in picking the right location.

Keep in mind your organization's technology requirements, as those decisions will impact your space requirements and layout. Typically voice and data cabling are excluded from leasehold improvements as these costs vary greatly from one tenant to the next. Therefore, selecting a reputable voice and data cabling integrator will allow custom design around your unique needs and a fixed-fee solution that includes working around other trades while delivering the project on schedule.

You'll also want to discuss with your existing landlord what will happen if your new space is not available by your planned exit date. It's also smart to negotiate access to the freight elevator and to make sure the A/C or heat will be working if you plan an after-hours relocation.

Stage 3: Taking Stock of What You Have & What You Want at the New Location

Planning your move is a big undertaking. If your business owns the furniture in your existing space and the technology powering your business, you can't just pick it up and move it to a new location. You'll need a complete inventory of everything that will be moved, and we recommend compiling that inventory at least 6 months in advance of your moving date.

Once your list is complete, it's time to determine if your existing business tools are performing at an optimal level to continue to serve your organization moving forward. Items that are performing well and will continue to do so should be included in your new floor plan and reviewed with your interior designer/space planner.

Items that don't properly meet the current or future needs of the organization, should be evaluated for replacement. Investing to relocate outdated technology or moving cubicles that don't project your organization's culture usually isn't the best long-term use of funds. Some things to consider:

- ✓ Does your furniture properly project the desired image of your organization? (This can negatively impact recruitment of new talent or attraction of new clients.)
- ✓ Are you moving (and renting space for) filing cabinets full of documents that should be digital, allowing your team to be more efficient? Is this the time to digitize your files and store the required documents in a less expensive storage location?
- ✓ Are you relocating a data room that is full of outdated technology? Perhaps it's time to move the majority (and possibly all) of your technology to "The Cloud."

The reduction in data room space and the power requirements of the data room can significantly impact your space layout and build-out costs (as well as ongoing power costs).

- ✓ Will moving to a Unified Communications platform allow your team to be more efficient and/or effective and potentially allow growth without adding personnel?
- ✓ Is “teleworking” something you are considering? If teleworking is a good option for some of your team, then you’ll need appropriate technology to support this initiative.

At Stage 3, it’s also important to select your voice and data service provider. Order your phone lines and internet access; if fiber is required and not currently in the facility, build-out timeline may be in excess of 6 months. You should also verify that all of your current phone numbers can be moved to your new location; this is often possible even if moving out of state.

Stage 4: Getting Ready for the Move

Remember that the key to a successful business relocation is through the selection of **high quality vendors and service providers**. If any aspect of the move is not properly implemented, the costs associated will be far greater than any savings gained from inferior low-cost providers.

While this is a good time to update/replace existing providers of current services, always remember to verify contractual obligations and provide proper termination notices to vendors being replaced. Plan these vendor transitions at least 3 months in advance of your move.

Stage 5: The Moving Date is Getting Closer

From 1 to 3 months prior to your move, the stress level of moving will definitely start to rise. It’s a tremendous opportunity for a fresh start for your business and employees. But to make sure you’re prepared, you’ll need to notify your providers of your new address.

Some of your providers include the Post Office, current utility providers, banks and all other services such as vending machines, office cleaners, etc. This often requires cancellation of agreements and identifying new providers at your new location.

From a communications perspective, Maryland Telephone can help you throughout the relocation process to insure your business calls will not be interrupted and your data network is fully functional.

Stage 6: Moving Day is Fast Approaching

With less than a month before moving, your employees will be anxious for the move, the office will start to look bare and the moving team will be working rapidly to define processes and schedules for the move. It’s critical to work closely with your technology providers to ensure

there is no interruption in service when your employees report to work the day of the move, and the day after.

6 Stage Business Relocation Checklist

Stage 1: Generally 9+ months prior to move

- Select a high quality real estate broker**
 - ◆ Knowledge and experience with the type of space you need is imperative. A specialist in office, industrial or flex space will locate the most appropriate space for your organization.
- Review your current lease**
 - ◆ Understanding the covenants of your current lease is vital (the person selected in #1 will assist with this) as it will help you select the best move date.
- Select one person to lead the relocation efforts**
 - ◆ In addition, one person from each department should also be selected to assist in the coordination of the relocation.
- Communicate the relocation to your team**
 - ◆ Employees can offer valuable input into the requirements of the new facility:
- Location**
 - ◆ Does a significant number of employees live on one side of the city who may not want to commute to a location further from their home?
 - ◆ Will employees have new or higher parking costs?
 - ◆ Do employees currently use public transportation and will it be readily available at the new location?
- Space**
 - ◆ Number of employees?
 - ◆ Expected growth?
 - ◆ Storage/Manufacturing/Warehouse needs?
 - ◆ Is exterior signage important and is it permissible by the building owner?
- Layout**
 - ◆ Private offices versus cubicles
 - ◆ What departments/teams/people needs to be need near/adjacent?
 - ◆ How can workflow be improved?
- Electrical requirements**

- Technology**
 - ◆ Audio/Visual
 - ◆ Voice & Data
 - ◆ Wireless
 - ◆ Security
 - ◆ Internet access/voice (phone lines) – if fiber is needed to deliver the speeds your business requires, please note that this could require a 6+ month build time.
- Rank requirements to the associated costs** to determine the scope of the new location.
- Begin the search for new space/location**
- Interview/Select an interior designer/space planner**
- Outline Branding/Marketing Update**
 - ◆ Moving may sound like a crazy time to evaluate these things. But your organization is about to purchase building and vehicle signage, new business cards, letterhead, envelopes, and announce to your clients and prospect that you have moved. If new branding and/or marketing campaigns are being planned, this may be the ideal time to implement a new look and feel.

Stage 2: Generally 6 - 9 months prior to move

- Narrow the search down to your Top 3 properties**
 - ◆ Insure the property meets your organization's requirements.
- Tour properties**
 - ◆ Include team leaders to obtain their input into the acceptability of selected locations.
- Uncover potential layout issues/challenges**
 - ◆ With each of the three properties (your interior designer/space planner can add some additional insight).
- Meet with the landlords and their property managers**
- Rank the Locations**
 - ◆ Based upon the feedback from the relocation team leaders
- Identify the necessary tenant improvements required**
- Negotiate with the landlord**
 - ◆ Utilize your broker for assistance and consultative advice to finalize your location and potential move in date.

- Select the contractor(s) to perform the tenant improvements**
- Negotiate with your current landlord**
 - ◆ You'll want to maintain your existing lease through your tentative move dates

Stage 3: Generally 6 months prior to move

- Complete a detailed inventory**
 - ◆ Determine what can be moved from the existing location to the new facility and what requires replacement:
 - ◆ **Furniture:**
 - Cubicles
 - Conference room furniture
 - Desks
 - Chairs
 - Tables
 - Filing cabinets
 - Lamps
 - Artwork
 - Etc.
 - ◆ **Technology:**
 - Copiers
 - Computers
 - Printers
 - Phones
 - Fax machines
 - Scanners
 - Audio/Visual equipment and controls
 - Data Room Equipment
 - Servers
 - Switches
 - Routers
 - Firewalls
 - UPS
 - Etc.
 - ◆ **Other office equipment:**
 - Kitchen appliances
 - Vending Machines
 - Etc.

Stage 4: Generally 3 - 6 months prior to move

- Select your Technology Providers for:**
 - ◆ Data/IT Network and/or Cloud
 - ◆ Voice (phone system) and/or Hosted/Cloud
 - ◆ Audio/Video Solutions
 - ◆ Copiers/Document Management
 - ◆ Security (it's time to migrate to key fobs/cards rather than keys if you haven't already made the switch)
 - ◆ Commercial Mover
- Select providers/vendors for internal services:**
 - ◆ Furniture
 - ◆ Cleaning
 - ◆ Trash/Recycling
 - ◆ Food Services (perhaps your office only uses a coffee service)
 - ◆ Snow Removal and Landscaping (if not a requirement of your landlord)
 - ◆ Etc.
- Meet with your property insurance provider**
 - ◆ Verify coverage for the relocation and update for your new location, as there may be specific requirements in your new lease.
- Order Office Stationary:**
 - ◆ Business Cards
 - ◆ Envelopes
 - ◆ Letterhead
 - ◆ Marketing Materials/Brochures
 - ◆ Etc.
- Meet with commercial mover to finalize the move:**
 - ◆ Verify that there will be plenty of boxes, crates, cartons (always overestimate).
 - ◆ Verify the mover has adequate dollies and staff on hand to complete the move on or ahead of schedule. Note that having cubicles re-built in conjunction with new cubicles can be challenging to time correctly and tight coordination is required.

- ◆ Verify who is responsible for moving your technology – the commercial mover or a specialist, as there are unique considerations for technology equipment relocation (e.g. if it is Winter during the move, placing a warm computer in a cold moving van for several hours will likely cause condensation. While the condensation will eventually evaporate, the components within the computer may corrode and reduce the life of the equipment.) It is often the little things that negatively impact a relocation project. This is why partnering with experts is important.
- **Review inventory of Office furniture/technology/equipment/etc. that WILL NOT be relocated. Arrange for:**
 - ◆ Auctioning/Selling of items that have value.
 - ◆ Donating items of little value to help a charity of your choice.
 - ◆ Recycling items that don't have value, but cannot be disposed of in a landfill.
 - ◆ Disposal of items that don't fall into the categories outlined above.

Stage 5: Generally 1-3 months prior to move

- **Notify Existing Service Providers**
 - ◆ Inform Post Office of your new address — also notify UPS, Fedex, or other shipping companies that you use on a regular basis.
 - ◆ Current utilities providers of anticipated shut-offs.
 - ◆ Bank/Financial institutions of your new address.
 - ◆ Providers of any/all other services of your new address.
 - ◆ Contact and coordinate the relocation of your vending machines or cancel agreements if there is a change required.
 - ◆ Schedule to have your office cleaned after move out (typically required by your lease). Also, your lease may require removal and proper disposal/recycling of your voice and data cabling.

Stage 6: Generally 1 month leading up to moving day and beyond

- **Request boxes /cartons from commercial mover to begin packing**

- Verify installation of new phone lines and internet access as well as data WAN if required**
- Work with your voice/phone solution provider to implement your new phone system**
 - ◆ Verify new extensions if any and develop a new listing for the office.
- Verify construction timetable**
 - ◆ Will it be completed on time or ahead of schedule? If anything is behind schedule, can it be reasonably completed after your office relocates into the space?
- Verify that your contractor has included office cleaning prior to move in**
 - ◆ If not contractor's responsibility, then you need to retain this service.
- As time allows, start labeling office furniture and equipment to be relocated (your commercial mover provides these tags)**
- If required, contact your landlord to obtain parking permits for the commercial movers' vans/trucks**
- Obtain exclusive access to the service elevator for the moving day/weekend. Most importantly, make sure that building security is aware the relocation is occurring and that access to loading docks will be available**
- Create new Office Forms**
 - ◆ Fax cover sheets.
 - ◆ Invoice sheets with new contact information.
 - ◆ Forms – preprinted or otherwise.
 - ◆ "Contact Us" page for your website.
 - ◆ "How to find us" forms or "Directions to our office" (provide the directions to all employees so each can find their new office location).
- Send "change of address" notification to customers, suppliers/vendors/partners and any publication subscriptions. Notify employees to do the same with any personal subscriptions**
- Generate and distribute employee-moving labels – typically provided commercial mover to assure they deliver boxes and equipment to the appropriate locations**

1-Week Prior to Move:

- Test and verify that new phone system, data network, phone lines and Internet are all working 100%**

- ◆ If phone system and data network components will be moved, confirm that voice and data partner(s) are ready to handle and deliver the project within the specified timeline.
- Throw out any/all obsolete material and shred then recycle outdated records, documents, etc.**
- Pack common areas**
 - ◆ If possible – don't let a relocation impact daily operations of your business).
- Clean and defrost the break room refrigerator**
- Identify materials going to a storage facility or other location than the new facility, move those items ahead of time**
- Walk-Through office with your commercial mover and verify everything is "tagged"**
- Request your Commercial moving company to train/show employees how to pack their personal space and items for a safe and easy move**

1-Day Prior to Move:

- Inform all employees that all items within their office/cubical space and desks must be completely packed and properly labeled for easy unpacking upon arrival**
- Collect keys to current space and provide key-fobs/cards to new space**
- Post signs in new location to aid commercial movers so they will know where things go by matching the labels on the boxes/furniture/art**
- Create a "lost & found" at the new office for any item that is not properly labeled or that loses its label during the move**

One Day After the Move:

- Verify that all phones and technology are working correctly**
 - ◆ The goal is business as usual.
- Walk through old space**
 - ◆ Verify everything has been moved out for cleaning crew to efficiently clean the space for return to previous landlord.
- Walk through new location with commercial mover**
 - ◆ Return all carts, dollies and other moving-related items.

1 Week After Relocation:

- Stop by old office to drop off keys to old landlord**
- Verify that mail and other deliveries are not going to the old location**
- File damage claims (in writing) with commercial mover**
- Work with marketing to plan an Open House to showcase your new facility with customers, partners and friends**
- Celebrate and plan an Employee Event to allow employees to become familiar with the new building layout and where various departments are located, what meeting rooms are available, etc.**