



Business Relocation Project Guidelines

24-19 Weeks Before Move

- Begin developing comprehensive move plan. Call **CBI Group** at **(210)665-3375**, for planning and project management services.
- Select an architect/interior design firm. Ask **CBI Group** for experience references.
- Develop lease space/building/furniture/IT needs and wants. Call **CBI Group** at **(210) 655-3375** to assist with furniture decisions.

18-15 Weeks Before Move

- Finalize lease/site selection and execute contract documents.
- Use correspondence to notify origin and destination property management of move.
- Work with architect/interior design firm to develop space plan and construction documents.

15-13 Weeks Before Move

- Finalize construction documents. Select and hire general contractor.
- Identify furniture/IT equipment for liquidation. Call **CBI Group** at **(210) 655-3375** for liquidation services.
- Identify any leased furniture, IT equipment or copier. Use correspondence to notify lessors of move.

12-11 Weeks Before Move

- Review and finalize move plan with **CBI Group** Project Manager
- Use correspondence to notify origin and destination property management of move dates, elevators, and entry/exit needs,
- Place orders for new furniture and IT equipment.

10-9 Weeks Before Move

- Begin demolition and/or construction.
- Finalize supplier for new furniture. Call **CBI Group** at **210-655-3375**. Finalize supplier for IT equipment needs.
- Review origin lease document to determine building move out requirements and lease space condition requirements. Call **CBI Group** at **210-655-3375** for lease space Final Clean Services.

8-7 weeks Before Move

- Meet with **CBI Group** Project Manager and department heads to review critical and/or time sensitive move plan segments.
- Create a trash and a secure document shredding day and schedule with internal teams. Call **CBI Group** for these services.
- Hire a qualified office mover with deep resources. Call **CBI Group**
- Use correspondence to confirm furniture delivery and move plan exclusive use of elevator(s) and entry/exits with origin and destination property management.
- Confirm equipment move schedules with **CBI Group** utility providers, security, furniture, IT equipment, or copier lessors.

6 Weeks Before Move

- Select and assign move coordinators for departments.
- Schedule **CBI Group** Project Manager with employees for move coordinator training and move kick-off meetings.
- Schedule employee packing and move responsibility meetings

5 Weeks Before Move

- Order new address mailing cards, business cards, new letterhead and envelopes with new address.
- Contact U.S. Post Office and complete change of address documents.

4 Weeks Before Move

- Finalize move plan schedule with **CBI Group**, other suppliers, and property management.

- Confirm again, in writing, all elevator and access requirements and commitments with suppliers and property management.
- Finalize security card access requirements.
- CBI Group** creates employee Move Handbook and/or Move Procedures Handout.
- Finalize all PC, printer, fax, copier locations, employees seating assignments, and telephone locations and extensions, Double check locations against electrical floor plans.
- Mail new address announcement cards to clients and suppliers.
- Create and schedule a "purge" campaign, with handout, with **CBI Group** to discard all files and items you will not need at the new location.
- Create a floor plan based move plan with move label numbers assigned to each person within an individual area. Assign colors per area.
- Contact **CBI Group** and confirm removal schedule of unneeded furniture that was identified for liquidation.

3 Weeks Before Move

- Review progress of new furniture delivery with **CBI Group**, confirm address.
- Create schedules for specific move coordinator assignment specific day and per location. Distribute them to the move coordinators.

2 Weeks Before Move

- Define "Lost and Found" area in each major destination area.
- Complete installation of new furniture. Punch-list all new furniture.
- Hold employee move orientation meetings with move coordinators. Review entire move plan, all labeled and area colored floor plans with everyone moving, provide moving crate use training.
- Finalize transition plan for IT and telephone system needs.

1 Week Before Move

- Review crate, box, packing material delivery plan with **CBI Group**.
- CBI Group** Project Manager to personally confirm elevator and access with property managers.
- Review final punch list for facility with construction manager and/or General Contractor.
- Move Coordinators to meet and review move responsibilities and area label assignments with all corresponding department personnel.
- CBI Group** Project Manager to post all label and color code directional signage at destination facility.

Move Day

- Take a deep breath and exhale.
- Walk through origin and destination space with **CBI Group** identifying any pre-existing damage to the facility.
- Station all Move Coordinators in their assigned areas at origin and destination to provide direction and answer any placement questions that arise.
- Work cooperatively and flexibility with employees, suppliers, and issues throughout the move process. Remember that all issues have solutions.
- At end of move, walk through origin and ensure that all labeled items were moved.

Move Day + 1 Day

- Work with **CBI Group** "smooth set" crew to make any adjustments that will make employees happier with their new surrounding
- Make a complete list of any move related damages to company assets or to facility. Provide lists to appropriate suppliers.

Move Day + 1 Week

- Take an extra day off. You deserve it ☺.