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Lawyers: Movin' Out

What Practitioners Should Know Before They Set Up Shop In A New Locale

BY TONY WRIGHT

Who gets to use the elevators? That's just one of a thousand logistical questions that the team assembled to manage the move of Palmer & Dodge had to address.

After decades at its old One Beacon St. location, in 2001 the large Boston firm made the move to new digs at 111 Huntington Ave., in the Back Bay

And because the building was still under construction, the firm had to compete with the various trade crews working under their own deadlines to complete the building. A consultant spent three months just coordinating a workable elevator schedule.

There seem to be more lawyers moving their offices than ever in Massachusetts, thanks to an up-and-down economy, a litany of law-firm mergers and the ever-growing notion that an attorney staying in one place for the balance of a career is an old-fashioned concept.

Choate, Hall & Stewart is in the process of planning a move to the top floors of Two International Place in Boston. The firm hopes to settle into its new home by mid-2005.

Sherin and Lodgen, meanwhile, welcomed partners, associates and staff into its new space at 101 Federal St., Boston, over the Fourth of July weekend.

And packing up a law office is not a challenge unique to large firms.

While moving a small firm or a solo practice may require less sweat equity than relocating a legal behemoth,

experts say many of the same considerations apply across the board, from the initial planning stages right down to the actual move-in day

Lawyers Weekly contacted attorneys who have been through or are planning a move to pick up tips on how to make such a daunting task more manageable.

The devil is in the details, say those who've been through it. But with careful planning and a dedicated team, law-firm relocation experts say the chore of moving every file, phone, computer, paperclip and everything in between can come off without a hitch.

Making The Move

Gretchen Fox, who runs FOX Relocation Management Corp. in Boston, the largest company of its kind in the country, has moved some of the city's biggest firms as well as some of the smaller ones.

A former law firm administrator herself, Fox knows the industry well.

Since establishing her company in 1988, with Ropes & Gray as her first client, Fox has worked with other familiar names — like Palmer & Dodge; Posternak, Blankstein & Lund; and Goulston & Storrs.

Right now she's in the midst of coordinating the Choate, Hall & Stewart move from 53 State St. Her firm was brought in to work in conjunction with Leggatt McCall Properties of Boston, a real-estate development and project management firm.

Leggatt McCall, according to John Sadowski, senior vice president and project manager, tends to focus on

management design and construction while Fox's firm concentrates its efforts on the actual relocation — managing the move itself.

To that end, Fox says firms considering a move should follow a series of steps to guarantee a smooth transition. (See sidebar, page B11.)

Crucial to a successful move is assembling a project team in-house that will guide and manage every aspect of the move.

Michael S. Sophocles, a partner at Choate, says his firm put together a team of five people — a combination of attorneys and non-attorneys — that meets weekly with each other and with other consultants who are brought in at critical stages in the process.

According to Sophocles, the firm's project manager from Leggatt McCall often works as the liaison between those on the inside and the many consultants, engineers and architects involved in the project.

Kim Kaufman Lipsy, marketing manager at Sherin and Lodgen, says her move committee was headed up by the firm's executive director who named four "move marshals" — one for each of the firm's broad practice areas.

The firm also hired a project manager, John Pilkington of A/E/C Solutions, Inc. out of Wrentham, who also acted as the liaison between the committee and the dozens of outsiders involved in such a large project.

Ronald W. Ruth, a partner at Sherin and Lodgen, says that it made sense to put attorneys on the committee who had the expertise to han-

dle a lot of the upfront legal considerations when it came to signing a lease for their new location at 101 Federal St.

"We were capable of doing the lease negotiations and drafting in-house," he says, while the external project manager coordinated the architects, construction managers, art consultants and furniture consultants, just to name a few.

Palmer & Dodge's Wendy Watts, director of administrative services, says the firm put together a seven-person committee — six partners and the executive director.

"We certainly had several of our real-estate partners involved because they could manage the leasing issues and were familiar with the market. There were a couple of business law practice attorneys as well, for negotiating the deal," Watts says.

With all the in-house expertise at the firm's disposal, Watts says she had to be convinced that the firm needed to hire outside consultants to get the job done.

"All the years I've worked at Palmer & Dodge we have redone areas, so when this project came up it was certainly the project of a lifetime.

Relocation Tips For Lawyers

Gretchen Fox, president of FOX Relocation Management Corp. in Boston, offers the following relocation tips for lawyers:

- Consider setting up a full-service small office for "must-do" work over the move weekend;
- Determine if you can move the library and/or file room one week before the main move to allow more than adequate time to relocate remaining items in a single weekend. Key to the success of the pre-move is to guarantee easy access for the interim period;
- Move antiques, artwork and plants out one to two weeks in advance of the main move, and move them into the new office one week after;
- Four to six weeks prior to the move, begin to include a notation on all outgoing correspondence (letters, e-mails, invoices) that the firm is moving and provide the new address and phone number. Follow up with formal announcements the week of the move;
- Plan for at least two file-purging events to reduce the amount of paper to be relocated and stored in the new office. Provide a "decision tree" for determining what goes where, and have off-site cartons, storage pick-up, trash hampers and move crates all ready for personnel to use.

ILLUSTRATION

— TONY WRIGHT



"Unlike a manufacturing company where there's a group that can be producing while everyone else is getting ready to [move], 95 percent of the people in a law firm — the secretary, paralegal, mailroom employees — are involved in delivering a product that can't be stockpiled."

— Gretchen Fox of FOX Relocation Management Corp., Boston

As we analyzed the parts I thought, 'been there, done that.' But it was an enormous job. I've never moved every single person and every single file on the same day," Watts recalls.

In retrospect, Watts says it was the right decision to bring in FOX to manage the logistics of the move. "They helped me with finding resources [for] who repaints file cabinets and with [deciding] what's the least expensive, most efficient way of doing this: Move them first and then paint them, or move them out to a warehouse in Waltham? And what do we do with all the files?"

In the end, it was determined that moving the file cabinets to the new location and painting them on a vacant lower floor would make the most sense.

There are literally hundreds of these minute details that surface throughout the course of a move, which, from the point a new space is secured, can take an average of six-to-10 months, according to Fox.

That timeframe can vary considerably, Fox notes, and the value that a relocation firm like hers adds comes in the way of timesavings, which converts into financial savings.

"We know this process, and we know potentially where all the land mines are and how to stay on track by keeping the decision-making process moving," Fox says.

Naturally, Fox encourages any firm considering a move to hire a relocation management company, insisting that it costs less than having attorneys spend too much time on the details of the move.

"Every hour that attorneys spend on [the move] is an hour they could be billing at a rate much higher than the rate we would charge them," she notes. "We can do in one hour what it would take a novice to do in four or five hours."

Watts says her firm chose FOX because Gretchen Fox once worked as a director of administrative services for a law firm, which gave Watts and others on the team a sense of comfort about working with her.

"As we analyzed the parts I thought, 'been there, done that.' But it was an enormous job. I've never moved every single person and every single file on the same day."

**— Palmer & Dodge's Wendy Watts,
director of administrative services**



The Phases Of A Move

Phase I: Strategic Plan

- Gather data regarding current and desired space utilization
- Identify budget and business constraints
- Establish critical path and contingency plans
- Verify project requirements, goals and objectives

Phase II: Organize Project Team

- Organize a project team to support the work scope and plan
- Identify roles and responsibilities

Phase III: Schedule, Budget Development

- Integrate activities into master schedule and budget
- Develop micro-schedule and detailed budget
- Monitor progress and track issues

Phase IV: Communications Program

- Develop internal and external

communications plan and methods

- Establish project identity
- Produce and distribute information — newsletters, instructions and posters
- Provide training and orientation

Phase V: Implementation

- Manage project process
- Verify readiness — equipment, personnel, etc.
- Implement and supervise moves
- Troubleshoot
- Verify completion

Phase VI: Resolution, Wrap-up

- Produce punch list
- Resolve punch list issues
- Follow up to measure project success
- Compile documentation and close project



— PROVIDED BY GRETCHEN FOX OF
FOX RELOCATION MANAGEMENT

There are other move-management organizations out there, including the Waltham-based Diversified Project Management.

Sadowski, of the project management firm Leggatt McCall, says the thing to pay attention to when hiring consulting and management firms to handle various aspects of a move is overlap of services.

For instance, Leggatt McCall and FOX Relocation Management both offer some overlapping services but yet are working together on the Choate move.

Fox encourages firms who are hiring both a general project management firm and a relocation management company to include representatives from both in every planning and decision-making meeting to avoid any repetition in services.

"To separate the consultants and have them report to different people in the organization and not collaborate can create big problems," Fox says.

"Have all consultants in one room together whenever possible. Otherwise there could be overlap, which could be costly," she advises.

The Mock Move

A costly but worthwhile exercise many firms opt for while planning moves is to set up mock work stations in the new space, experimenting with lighting and furniture styles before settling in on any fixtures or designs.

Watts says it was "one of the smartest things" her firm did.

"We had looked at furniture in the showrooms, but really seeing it in the office it would be in made a huge difference. The furniture we liked the best functioned the poorest," she says.

The firm, according to Watts, set up three faux partner offices, three

associate offices, two legal assistant workstations and one secretary workstation, and had them all furnished with different lighting systems and desks.

The firm encouraged employees to come to the new space, try out the furniture and give feedback about it and the lighting.

"It was kind of daunting when it was first proposed, admits Watts. "It was an expensive add-on, but it was worth it," she says, noting that the team made "significant changes" based on the feedback it received.

Staying seamlessly in operation is of the utmost priority to firms on the move, say those who've been through it, and unlike other industries, the products and services that law firms produce can't be warehoused.

Law firms have much more desktop technology than other industries, notes Fox.

"And unlike a manufacturing company where there's a group that can be producing while everyone else is getting ready to [move], 95 percent of the people in a law firm — the secretary, paralegal, mailroom employees — are involved in delivering a product that can't be stockpiled," she says.

As such, most firms opt to move around the clock over a weekend.

"And technology needs to go last and be up and running first, adds Fox.

Sherin and Lodgen's Fourth of July weekend move went off without a hitch according to Ruth.

"We spent a lot of time thinking about keeping operations going and we had computer capability throughout the weekend," he says. "It was a seamless move."

Sophocles is hoping for the same when Choate makes its move next year.

"This will be a largely turnkey event," he says. "We'll go over and turn on the lights."

Some Pointers

Sophocles recommends hiring consultants early in the process and cautioning a dose of patience.

"This is a long process in terms of selecting an appropriate property, negotiating a reasonable transaction and ultimately constructing it. It takes time," he says.

Sadowski agrees and says that the order in which firms hire the myriad of consultants is also important.

"Many start with the architect, but decide first who your point person is," he says, either internally or externally.

Watts says that carefully choosing which pieces of infrastructure to reuse and which to buy new can make all the difference for a successful move.

"We invested in new furniture. We have new space that impacts people's commutes and lives, and to have new space and shabby furniture — people wouldn't feel positively about the space and the change," she says.

Kaufman Lipsy says it's a smart idea to have people pack up their own personal workspace so that they know exactly where things are when the boxes arrive at the new space.

Regarding a budget, Fox says add in a 10 percent contingency.

"And have a budget you can live with and have it ready to go before you start any of this," she says.

Fox notes that because many law firms have clients who come into the firm, it's important for the new space to be not only operationally ready on opening day, but also visitor-ready.

"You don't want parts and pieces lying on the floor," she says.

Finally, Watts offers what may be the most practical advice of all: provide lots of food and beverages every step of the way.

"If you feed them, they'll continue to work," she offers.

Questions or comments may be directed to the writer at twright@lawyersweekly.com.