

Real Estate A Special Report

The Step-by-Step Move

Law firms face a host of details when they undertake a relocation.

By MARTA GARCIA ARNOLD

These days, it seems that area law firms are either announcing their firm's expansion or a merger with another practice. Regardless of the transition, new space is often required, necessitating a complete relocation.

Relocating a law firm is often a complex and detailed process. Given the high cost of firm downtime, any relocation must be swift and seamless. Additionally, transitions can be costly—particularly if unforeseen problems arise as a result. Law firms are increasingly seeing the value in outsourcing the entire process to professional transition management companies that are experts in managing the nuances of numerous changes simultaneously.

In years past, many managing partners and administrators believed they could handle a transition or move using only their facilities management team. But today, the stakes have gotten too high to leave anything to chance.

Today's law firms must consider the safe and secure transfer of:

- Expensive and highly complex technology infrastructures;
- Specifically designed or flexible workspaces;
- Data storage rooms filled with confidential client information;
- Libraries with extensive and costly publications;
- And expensive furnishings, art, and antiques.

Whether the firm is small or large, whether it is growing or merging, or whether it is moving across the hall or across the country, there are six fundamental phases to consider prior to embarking on a company transition.

DEVELOP A STRATEGIC PLAN

Planning is the most important phase in the project. It is in these critical early stages that a transition management expert will take a holistic look at the project and create a master plan tailored to a firm's specific requirements. All nuances must be considered while getting approval from key decision-makers and setting expectations for all those involved in the transition. Key activities during this phase include:

- Gathering data regarding current and desired space utilization and coordinating your build-out with your anticipated growth, work environment, and relocation requirements.
- Identifying business drivers and constraints to ensure the least amount of disruption during peak periods, such as March and April for tax attorneys.
- Identifying milestones; determining the sequence of moves based on construction, department relationships, work schedules, client initiatives, I.T. capacity, hardware availability, furniture and equipment reuse, and new furniture procurements.
- Establishing both a critical path to success and contingency plans and identifying tasks and functions that must occur for the move to be successful, as well as how to determine what must be done to mitigate the impact of those negative events that surface in spite of detailed planning and preparation. The goal is to ensure that the critical aspects of the business are not interrupted. For example, someone must look out for schedule slippages, construction delays, unforeseen I.T. issues, in-process move delays (elevator damage, power outage, vehicle breakdown, and so on.)
- Reaching consensus on project requirements and objectives to ensure that all participants perform the tasks identified during the pre-move phase.

ORGANIZE THE PROJECT TEAM

The need for a dedicated and strong team is essential during a complex transition—which is why it is important to assemble an in-house team to guide every aspect of the transition. The project team should include people at all levels of the organization to ensure that each group's concerns are heard. Key activities include:

- Identifying team members to support the work scope and plan. Involvement from a variety of internal teams will help ensure a smooth transition.
- Assigning specific roles and responsibilities to all team members. These include internal communication, logistics, I.T. requirements, new furniture, and furniture reuse.

- Choosing a regular time to meet monthly, then weekly, then daily prior to the move. These meetings are attended by the project team (internal and external team members) to ensure that all tasks are being performed. During these meetings, the critical path of the project is confirmed, delays and slippages in the schedule are identified, and corrective action is taken.
- Identifying and selecting critical vendors.

SCHEDULE AND BUDGET DEVELOPMENT

It is critical that a schedule of all move-related tasks and responsibilities be developed and integrated with the construction and internal business schedules. Equally as important is the development of a budget based on pertinent project parameters. The accuracy of the budget is heightened by the use of bench-marking data collected from similar past projects. The budget should allow for a 10 percent fluctuation. Key activities during this phase include:

- Integrating activities into a master schedule and budget.
- Developing a detailed schedule and budget.
- Monitoring progress, identifying issues, and responding to those issues when they arise. This is an ongoing process. Some potential problems never materialize. Others materialize and are dealt with. New risks are identified and mitigation strategies and contingency plans are devised as necessary. Sometimes potential problems submerge, only to resurface later.

CREATE A COMMUNICATION PROGRAM

Regardless of the size of the firm, one thing is certain: The staff appreciates being “in the loop” regarding the company transition. It is impossible to over-communicate with employees—doing so makes them feel an important part of the process. If done correctly, communications can also generate excitement about the transition, encourage team building, and improve overall morale. Key activities during this phase include:

- Developing internal and external communications plan and methodology.
- Identifying who on the project team is the “point” person for internal questions and responses; creating a communications flow-chart to make sure that all internal groups and teams are aware of news and deadlines; creating a “move hot line;” and identifying key external parties that should be made aware of a pending move. This includes vendors, temporary agencies, outside paralegals, and shipping services.
- Establishing project identity: Giving the transition project a name to help ensure that everyone who receives news about the move can recognize it as such. One Boston-based law firm referred to its move as “Project Relo,” for example.
- Producing and distributing information both online and in the form of newsletters, instructions, and posters.
- Providing ongoing education, information, training, and orientation. For example, hold periodic “town hall meetings” where the project team provides updated information to the staff and answers their questions.

IMPLEMENTATION

During this critical phase, all teams, vendors, processes, and transitions go into motion. If the earlier phases have been successfully completed, the implementation phase will run smoothly. Key activities during this phase include:

- Managing the entire project process to ensure that all players

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have received all necessary instruction and are 100 percent clear where they should be, what they should be doing, and when they need to complete their tasks.

- Verifying readiness to ensure that appropriate equipment is onsite and available, such as ensuring that packing crates and dollies are delivered, that sufficient quantities of Ziplock bags to store and move computer peripherals have been distributed, and so on.
- Implementing and supervising the transition until it’s completed.
- Troubleshooting in general. Offering on-site supervision during the physical move by an experienced in-house team to resolve issues immediately as they surface, such as elevator damage, or personnel not packed and ready.
- Verifying completion via a final walk-through to confirm completed transition tracks with the overall project plan. The client project manager and the team will do a final “sweep” of the affected spaces to ensure that all furniture, crates and boxes, and all other items have been relocated and are in their proper spaces; that no damage has occurred to equipment or the new facility, and so on.

WRAP-UP

Simply because the transition has successfully taken place does not mean that the overall project is complete. During this period, minor repairs are made, parts replaced, furnishings moved, etc. Key activities during this phase include:

- Developing a “punch list” that includes details and tasks requiring further attention and action. Consider all aspects of the contract when developing this list: furniture in place, cubicles in correct locations, library back in workable condition, all packed boxes accounted for, everything in its pre-move condition.
- Resolving all issues on the punch list. Make sure you and your transition vendor agree on problem resolution. For example, will damaged items be repaired or replaced?
- Following up to measure project success. Most likely, this is not the last move your firm will make. What lessons were learned that can help ease the next transition?
- Compiling all documentation to officially close the project.

Naturally, every transition or relocation has its own challenges and obstacles. If you start the process early, you will save time, money, and headaches while experiencing minimal workflow interruption.

Marta Garcia Arnold is the principal of the D.C. office of FOX Relocation Management, which since 1988 has provided transition services. From its offices in Boston, New York, Washington, D.C., and Providence, R.I., FOX has managed transitions for clients throughout the United States and Canada.