

# Universal

## The Key to a Successful Office Move



Best  
Practice  
Guide



# THE STANDARD FOR OFFICE AND BUSINESS RELOCATION

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Our companies are customer focused, providing professional unbiased advice and fixed quotations to achieve the most effective relocation for your business. Services on offer include:

- office and commercial relocations
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- file audits and moves
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- crate hire and control
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## THE KEY TO A SUCCESSFUL OFFICE MOVE

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# The Working Environment following Covid-19

The working environment will look different for most of us in the wake of the Covid-19 pandemic. So it's wise to keep abreast of ongoing developments and to take direction from reliable sources such as Public Health England, the NHS, the World Health Organisation and the UK Government.

Your organisation – and you as the FM - will need to assess the workplace environment and take suitable measures and precautions to keep employees, visitors and contractors safe.

This section covers highlights what is recognised as good working practices (at the time of being published online) to keep everyone safe.

## Protecting the organisation's staff

- Keep the workplace clean, paying regular attention to high-contact or areas such as door handles, kettles and keyboards, or busy areas like kitchens or boardrooms.
- Supply plenty of handwash and encourage staff to wash their hands regularly and dry them thoroughly using paper towels or electrical hand dryers.
- Provide hand sanitiser in addition to washing facilities.
- Use signage and printed guidance
- If social distancing is not possible, then limit the number of people each person has contact with.
- Encourage respiratory etiquette, including covering coughs and sneezes.
- Discourage workers from using other workers' phones, desks, offices, or other work tools and equipment, where possible.
- Develop protocols such as a clear desk policy to enable effective cleaning. These should be applied strictly.
- Try and avoid face to face meetings if possible with both staff and clients. For those staff who are out and about consider buying plastic face visors for them to present a visible, friendlier face to your customers.
- Ensure that staff stay at home if they are ill and advise them to self-isolate for the recommended period
- If any of your employees are especially vulnerable then allow them to work from home if this is possible.

There is a useful guide published by Unison here: <https://shop.unison.site/product/how-to-work-safely/>



## Working with removal contractors

Whilst the virus is still ongoing it's very likely that the physical set up of offices, rooms and thoroughfares will need to be changed to meet regulations and best working practices. So it's more important than ever that you select a professional removal contractor; one that gives you confidence in their understanding of operating in the new – and likely rapidly changing – environment. The virus will have caused and will continue to cause changes to the workplace and they will be able to assist you with their ongoing experience and knowledge of the best working practices at any time.

- Where at all possible carry out any surveys and obtain quotes remotely
- Alongside the contractor conduct a risk assessment of your office workplace from a Covid-19 perspective. Think about lifts, entrances, reception and all communal spaces, and how people will work in and move around, these.
- Ensure the plan for any move or project observes current social distancing guidelines – whether those of your organisation or by following those prescribed by the Government. This might include rearranging the furniture, such as facing desks away from each other or putting barriers in place.
- Obtain a comprehensive and detailed plan from your contractor, covering what any move stages will be needed, what any likely disruption will be, and the impact on staff whether present or not.

- If some of the furniture is to be removed and taken offsite it will need to be disinfected properly and covered /bagged where relevant.
- Discuss whether the removal crews will arrive with their own masks, gloves and disinfectant or whether you wish to furnish them with these.
- Limit the number of staff within the removal area if it is to be carried out during working hours and maintain social distancing protocols where they are in the office.

## Ask your contractor about...

### Fogging

Many commercial moving jobs will currently involve moving excess office furniture into storage to allow for social distancing measures to be enforced.



A fogging service carried out by a trained contractor could safely entirely sanitise all items and indoor areas before and after a job has been completed. Though it's important to still clean touchpoints (such as door handles and stair rails) individually, fogging can rapidly treat large areas in a rapidly short space of time.

### Barriers

Ask your commercial contractor if they can source and/or fit clear, hygienic, wipe clean partition barriers walls for work areas and industrial spaces. Creating partitions between workstations can help to avoid the possible airborne transmission of the virus.



# 1. The Importance of Planning

The aim of this Guide is to describe good practice in all types of commercial (non-domestic) moving activities. It is intended to inform and assist those, such as Facilities Managers (FM), who hold responsibility for organising and managing such activities and others who may only be responsible for some individual element or phase of a move. The Guide emphasises how planning is the key to a successful move and it describes the many different facets that must be taken into account to ensure success with the minimum of disruption to the organisation and its staff.

Organisations may move either wholly or in part for a variety of reasons, such as expansion or reduction in size, rationalisation of multiple locations, expiry of leases or simply for financial considerations. Whatever the reason, moves can be traumatic and costly to both the organisation and its staff and customers or patrons. However, with proper planning, well in advance, downtime and inconvenience can be minimised and normal activities can be resumed according to the agreed timetable.

## The Outline Plan

Unfortunately it is not uncommon for the person who will oversee the move to become involved in the planning of it only at a relatively late stage, particularly in smaller organisations that do not have a dedicated facilities manager.

Executive management may have made decisions that include the selection of a new or additional site or building, the transfer of certain departments or activities or the closure and disposal of certain premises. So these aspects may well be 'fait accompli' by the time the FM (or the person acting in that capacity) is involved.

It may be difficult for an FM to insist on early involvement depending on his/her seniority within the organisation but the importance of specialist advice cannot be over-stressed and every effort should be made to ensure that the ultimate decision-makers take the FM into their confidence at the earliest opportunity.



Whatever the reason, moves can be traumatic and costly to both the organisation and its staff and customers or patrons.



With specialist advice and knowledge an FM can bring a great deal to the discussions, pointing out fundamental positives and negatives in the proposals and sometimes avoiding costly mistakes.

For example, the timing of the various phases of a move can have a dramatic effect on its complexity and therefore, potentially, its cost. Often, the ultimate benefit of new premises will be a major driver for executive management to occupy them at the earliest opportunity and commitments will be made accordingly. However, an experienced FM will consider other factors such as, in the case of a new business park, a period of difficult access due to continuing construction work on adjoining premises and/or approach roads; the possibility, in shared premises, of neighbouring organisations carrying out moves at the same time; the lead time for essential services such as IT connectivity; disruption to critical production schedules; seasonal factors such as staff absences on holiday; the lead time for purchasing and delivery of new furniture or other equipment. It may be desirable to include the culling and recycling of files to reduce the volumes for transport and storage and the disposal or re-assignment of unwanted furniture. There are many opportunities for avoiding unnecessary complications to a move project.

A good plan will include specific timings for the various aspects of the move, including each element such as file culling, fit-out of the new areas, pre-packing of personal items by staff, the uplift by the contractor from the various premises and the delivery and set-up timings for each new location. It's worth bearing in mind that if any office equipment is leased, the lease company may have placed restrictions, and often the CMG member

fulfils the criteria for moving, inform the lease company you are relocating with a CMG member, and this can often save you money. Every move project is unique and the circumstances and drivers will be different in every case. Sometimes the IT department may dictate the precise schedule of the move, especially if the systems are fundamental to the organisation's daily functions, as is almost always the case nowadays.

## DOs and DON'Ts

- **DO** involve the FM and/or project manager for the move at the very earliest opportunity
- **DO** undertake file/storage auditing and culling as appropriate at an early stage
- **DON'T** dismiss the need for offsite storage as it can free up expensive internal space

## The File Audit

A move is an ideal opportunity to rationalise all the files that an organisation accumulates over time. A file audit will identify the type and volume of filing systems required to be moved, especially vital if old storage systems are being replaced with new, or if the facilities are being downsized and space will be at a premium.

The archives may well be full of records which are not kept for any valid reason. Other than for legal reasons, an organisation has full discretion over the retention period for its files and records and unfortunately this is an area that sometimes does not receive enough regular monitoring. Almost certainly there will be scope to reduce the volume of file storage, often very considerably.



The disposal of unwanted records must be considered and planned. They are often confidential, whether containing customer details, design or product information, personal data for staff or file records. There are many reasons why files cannot simply be left for the waste collection service. Recent legislation ("GDPR" May 2018) places great responsibility and accountability on anyone holding "personal information" and it is essential that the proper precautions are taken when disposing of any such data.

A professional, confidential shredding/record destruction service should be used. Many commercial moving contractors are able to provide this, either directly or through a service partner.

The accurate mapping of systems from the old site to the new site is fundamental to overall success. If it is not possible to move directly from building to building for some reason, consider the need for temporary storage. Identify the non-essential items and assess the quantity and thus the cost of storage and factor this into the budget, even if only on a contingency basis.

## DOs and DON'Ts

- **DON'T** forget to include individuals and their workgroup requirements when planning the future space and the phasing of the move
- **DO** draw up a detailed, phased programme for all aspects of the move
- **DO** involve the removal contractor at the earliest opportunity

## Furniture

Where an organisation is moving into a completely new facility, or where there is a need to have a uniform appearance, it is likely that some of the property and equipment – particularly existing furniture and seating – will be replaced and therefore the used items must be disposed of.

Within the largest, multi-location organisations, there is the possibility of passing such items to another branch if they are in good condition. However, frequently there is no alternative but to sell them to a dealer or ask the removal contractor to dispose of them.

Many of the larger relocation contractors are involved in this as a subsidiary activity and are able to recycle office furniture and equipment that is in a good, clean, sound condition. Or if it is past its best, they will be able to transfer it to suitable waste processing facilities.

As a worthy alternative, there are various charities specialising in the recycling or re-use of office furniture and equipment and there may be some local to the organisation that would welcome the surplus goods.



## Space Planning

The FM will probably have responsibility for space planning but sometimes there will be input from Department Managers who will have their own ideas as to what looks best, what works best and the amount of space their people require. These preferences, which are sometimes expressed quite forcefully, should be weighed up carefully as they may not always fit with the overall aims of the organisation, the budget or simply the available space.

A move also presents the opportunity to consider agreeing a space standard to apply across the new building(s) to ensure efficient use of the space. There needs to be a method for understanding individuals' specific requirements, including factors such as the Equality Act 2010, and lighting and space standards. It may be helpful to use the experience of a specialist contractor in taking an objective view and putting forward the optimum layout, as their neutrality will be useful in recommending simply what is in the overall best interests of the organisation, without fear or favour to those department managers who are territorially-minded.



**A professional contractor will be experienced in looking at all aspects and advising on the most appropriate phasing.**

## DOs and DON'Ts

- **DO** liaise carefully with IT management to ensure system availability throughout all phases of the move
- **DO** review the suitability of existing furniture and equipment and consider the lead time for delivery of replacement items
- **DO** ensure that specialist support resources, for example lift engineers, electricians and others are available in case they are needed

## The Detailed Project Plan

With assistance from the selected removal contractor, the FM can establish the detailed plan, what phases will be needed, the likely disruption to production or service, the impact on staff and the required level of their involvement (which must also be organised).

Whether the FM takes primary responsibility for the move or whether it is delegated to a contractor on a turnkey basis, it is preferable to place it with one party only. This avoids any confusion during the move, avoids split or contradictory decision-making, and allows other management and staff to concentrate on their own business functions.

A professional contractor will be experienced in looking at all aspects and advising on the most appropriate phasing, as well as handling specialist areas such as the decommissioning and reinstallation of desktop IT equipment, even that which forms part of a sophisticated network.

## 2. Resourcing the Project

In a large organisation there may be a team of maintenance staff who are able to handle small and straightforward internal moves of furniture and equipment, perhaps with assistance from IT support engineers and a qualified electrician. Clearly it makes sense to utilise such resources when suitable opportunities arise. These would include the occasional repositioning of a few desks and cabinets, etc. within an area, or perhaps moving them from floor to floor. This can arise quite frequently and often at short notice.

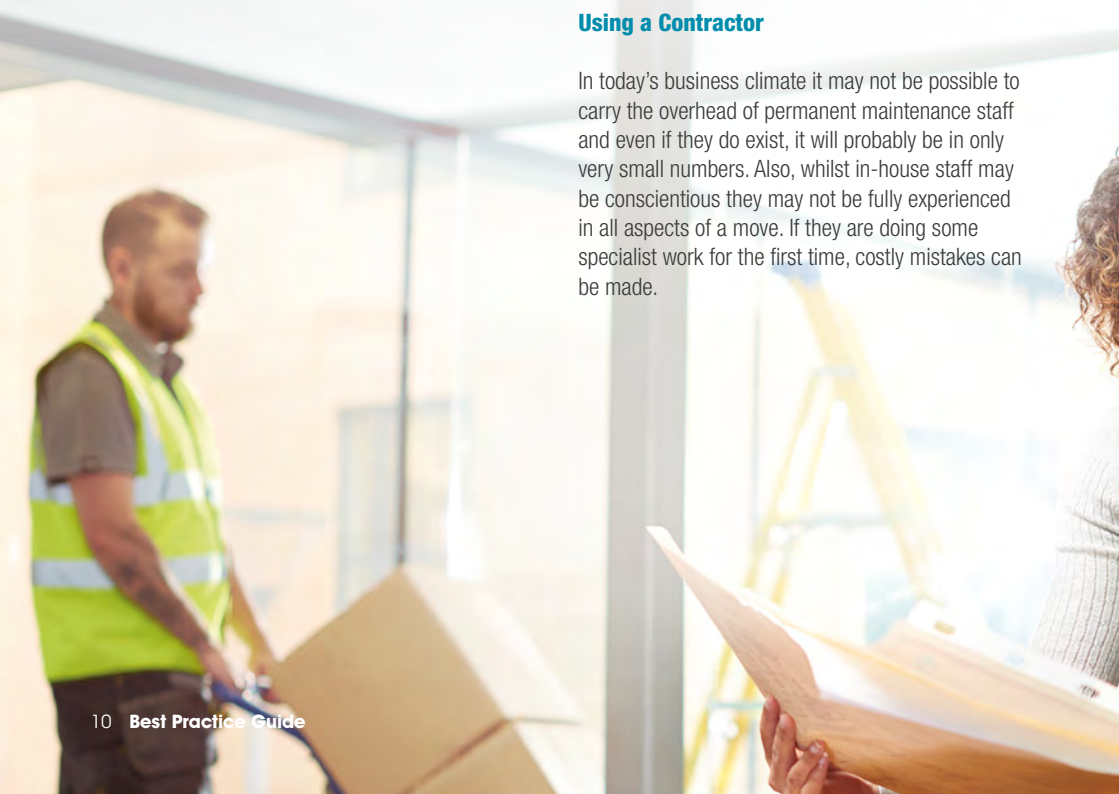
If possible, the FM should resist the call for “immediate” movement as a one-off exercise and await similar requirements arising within the next week or two, to make better use of time and manpower resources.

### See the ‘Big Picture’

What may appear at first sight to be a quick, simple one-off move can actually be quite inefficient and time-consuming when viewed in conjunction with other adjacent moves taking place within a short period of time. Far better to stand back and look at the bigger picture, consider them all together, plan and carry them out at the same time with only one disruption and one movement. Of course this is not always feasible as the need may indeed be urgent but quite often with a little careful thought and better planning it is possible to combine small operations and avoid moving items twice or more, inconveniencing staff several times and avoid damage through unnecessary repeated movement. Viewed objectively it makes perfect sense to do this, but the problem is that the apparently urgent business need will not always allow an objective view.

### Using a Contractor

In today’s business climate it may not be possible to carry the overhead of permanent maintenance staff and even if they do exist, it will probably be in only very small numbers. Also, whilst in-house staff may be conscientious they may not be fully experienced in all aspects of a move. If they are doing some specialist work for the first time, costly mistakes can be made.



It is increasingly common for these duties to be outsourced, either on a contract basis or perhaps simply as a call-out service as and when required.

In this case it is advisable to have a regular contractor who can provide the necessary resource at short notice to deal with relatively simple moves. It is also an ideal proving ground through which to select a firm that is responsive, careful and efficient whom you can trust when the time comes for a larger more complex operation.

It may be tempting to “spread the work around” to several contractors and to some extent this could be beneficial because it does provide broad experience which will help you find the best supplier. But if occasional small moves are spread too thinly they may cease to have much appeal to a contractor who is otherwise busy and he may be less responsive and less ready to go the extra mile for you.

## DOs and DON'Ts

- **DON'T** carry out piecemeal moves on demand – you may be able to group these together and achieve cost savings and reduced disruption
- **DO** spend time preparing a detailed Scope of Works and use this as the basis for the tender to ensure like-for-like responses

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# 3. Selecting a removal contractor

## First Considerations

Ideally the contractor should be involved in your project plan from an early stage, helping to provide a feasibility study and detailed costing of the project. To enable this, the selection process must start early.

Do not wait until the dates are fixed, the new building has been fitted out, the space has been planned, and only then call in the removal contractor. Make them a key partner from the outset as their experience and range of skills will certainly bring a great deal of expertise to the project that will be of undoubted benefit, as discussed earlier in the planning section.

Before you start the selection process, be certain of the scope of work that needs to be addressed, for example, what (if anything) is not to be moved, what may need to be taken to offsite storage and what is to be disposed of and/or recycled? A thorough review of all involved sites and their respective contents is absolutely essential, as is a clear instruction on what is to happen to them. Every move is different and it is extremely important that all such information is formally documented in a Scope of Works. For the avoidance of doubt you should also identify those aspects that are not to be included in the move. Also it is important that you state any special conditions or requirements and any potential constraints such as working hours or access restrictions.

Think carefully about how many firms you want to tender. If this is likely to be more than three or four it will take up a lot of your time. If your colleagues in the procurement department insist that more than this should be invited, then it becomes even more important that all of the project requirements are

fully established and documented, to ensure that all of the companies will be quoting on the same basis and you will not have to spend unnecessary time investigating potentially significant variances between the tender responses received.

## Procurement

If you have had good experience from a contractor handling your occasional small moves with care and efficiency, they will probably be a natural contender when a large project arises. Nonetheless, a proper procurement procedure should still be followed (and indeed, the purchasing policy of the organisation will almost certainly dictate that there be a formal tender process).

It must be remembered that a major commercial move is a truly critical project with the potential for extremely serious consequences if it is not carried out on time, without loss or damage. In a manufacturing environment production can be disrupted, causing costly losses. In the service sector the organisation can fail its customers if staff are unable to resume work on time, potentially causing loss of contracts. In the public sector, especially in healthcare, critical services may be suspended causing backlogs that may take weeks to overcome. It is essential, therefore, to select a company with adequate resources, coupled with proven ability. Analyse their track record and performance, look for experience of your type of project in your industry sector and study their technical skills and knowledge. Ask for examples of previous projects similar to your own and take up those references at an early stage – talk to, or preferably visit in person, your counterparts at several of those client organisations and assess the levels of satisfaction achieved in their moves.

## Subcontractors

Consider whether your project is too big or too small for them, check if they specialise in high or low value contracts. This can be done by asking for examples of their business mix and client size over the past two to three years. Also consider whether they can service all locations involved from wherever they are based – if not, who will their partners or subcontractors be and are those supporting firms capable of operating to the same criteria as the principal contractor or will they be a weak link in the supply chain?

What is their commitment to minimising their impact on the environment and what practical measures do they take in this respect? Review their environmental policy and obtain confirmation that this is put into practice in their daily operations. To what extent are their packing materials produced from recycled products and how are they, in turn, re-used and/or recycled? How are the inevitable quantities of waste materials disposed of following the completion of a move? Are their vehicles fully compliant with carbon emission restrictions and what operational measures do they take to minimise unnecessary journeys during a move?

Most importantly, do they seem as though they really want your project? Are they committed? Have they properly understood your brief and can you work with them? Will they do whatever it takes to deliver the goods (literally) on time and on budget? Satisfy yourself that they have the right level of financial stability, an exemplary health and safety record and adequate insurance cover across all activities including Public Liability, Employer's Liability and Goods in Transit.

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If you have had good experience from a contractor handling your occasional small moves they will probably be a natural contender when a large project arises.



## Commercial Moving Activities



As an initial criterion, consider only those firms who are certified to the British Standard BS 8522:2009 “Commercial moving activities”.

This standard was initiated by the Commercial Moving Group (CMG) of the British Association of Removers (BAR) which has made it a mandatory requirement for membership of that Group. This enforces certain levels of service which were developed and agreed by a steering group including representation from the CMG Council, the FM industry, the Driver and Vehicle Standards Agency (DVSA), the Industry Ombudsman, Insurance Brokers and of course BSI.

The BS 8522 is now further enhanced by UKAS accreditation, which is recognised and accepted all over the world, setting those companies who have it ahead of the competition both in the UK and abroad.

Companies holding certification to BS 8522 are all inspected on a regular basis (usually every 12 months) to ensure that the standard of their facilities, equipment and expertise remain at the necessary high levels to retain certification to the standard.

Before shortlisting check that a firm can provide evidence of current third-party certification to this standard. Membership of the BAR CMG is a good starting point.

For further information and a summary of the requirements of BS 8522, visit [www.bar.co.uk/cmgs](http://www.bar.co.uk/cmgs). It can be helpful to have a “pre-qualification” phase in which you issue a questionnaire to a number of potential contractors to assess their suitability to go forward to the formal tender process. This can “weed out” contractors who might appear initially to be candidates but who do not meet some of your essential criteria. With a shortlist of contractors formal Invitations to Tender can then be issued.

## The Tender Process

Your organisation may have its own format for formal tenders but often these are quite generic and do not reflect the specialist nature of removal work. Companies quoting will more than likely have their own proposal format.

It can be helpful to lock this down by providing a list of headings against which their responses must be made, (see next page). In this way you will ensure consistency of presentation and it will make it much easier to compare the responses, while being confident that they are all on a like-for-like basis.

You can allow them still to provide their own material and information in addition to this but it is important that the basics be consistent.

It is quite common to show several competing contractors around the premises at the same time and this has the distinct advantages that:

- (i) they all see and hear the same requirements and
- (ii) it saves a great deal of your time compared with showing them around separately.

If you do undertake to see companies individually, it is vital that the same person from your organisation should be present at each site to ensure that all bidding contractors receive a consistent brief and description of the requirements.

It is essential that all factors affecting freedom of movement are known to the contractors. They must be given full details of access, parking facilities or restrictions and any limitations on hours of operation at each of the locations involved.

The outline programme for the move should have been agreed internally before you meet with the contractors and this can then be provided to them with reasonable confidence that it is what will be required (though, of course, last-minute alterations sometimes arise and it should be made clear if this is a possibility).

## HEADINGS FOR CONTRACTORS' PROPOSALS

### These should include

- A full description of the services to be provided
- A statement of the company's experience/ suitability for the project
- The availability and qualifications (experience and training) of their crews
- Details of the equipment to be used
- A schedule of quantities
- The proposed timetable and programme
- Any exclusions from the services and the quoted price(s)
- The scope and terms of insurance cover or liability; see 'Insurance' section on page 21
- Details of any special arrangements, handling equipment, packing methods and others
- Risk Assessments and Method Statements
- Health and Safety Policies
- Environmental Policy and Practices
- Certifications e.g. BS 8522, ISO 9001, ISO 14001, ISO 45001, ISO 27001
- Proof of Insurances
- Some comparable performance references
- Terms and conditions of business



Before shortlisting check that a firm can provide evidence of current third-party certification to this standard. Membership of the BAR CMG is a good starting point.

## Avoid Peak Times

Summer and weekends are peak times for the moving industry and contractors may require greater periods of notice and charge more at those times. If you have any flexibility you may save money by arranging the move for a quieter period.

It is quite possible that you find a variance in the prices quoted. If this is significant it may mean that a contractor has misunderstood the brief and/or omitted certain requirements. This should be checked in order to ensure that the various quotations are indeed like-for-like; are there any exclusions or chargeable extras that you have not taken into account.

It is best not to select a contractor on price alone. What matters most is a successful result. A disastrous result for a few pounds saved is a wholly false economy and may well reflect badly upon you as the person responsible for appointing the service provider. Your decision should be made against both price and value ensuring confidence that the selected company will indeed carry out the required services on time, within budget and with minimal disruption.

References are useful but should not be relied upon at face value. Visit the short-listed contractors' facilities, assess their standards of orderliness, maintenance and professionalism, the condition and presentation of their vehicles and the appearance of their personnel. Try to visit a move in progress for another comparable organisation – your counterparts there will probably be quite happy to

share their experiences with you so long as you do not take up too much of their time, and in this way you will be asking your own questions and hearing their views directly rather than relying on information that may have been fed to you selectively by the companies bidding for your contract.

Once you have selected the removal contractor you can firm up the overall budget, factoring in the costs of other suppliers who may play a part. Allow provisional sums for items that cannot be costed in detail and include a reasonable contingency figure, perhaps 10 per cent of your budget. This, once complete, may need to be submitted for financial approval (according to the procurement policies of your organisation). Even if such approval is not strictly required, it may be prudent at least to offer it to the Finance Director or equivalent, for review. Once approved, avoid adjusting the requirements (and almost inevitably the costs) unless absolutely essential.

## DOs and DON'Ts

- **DO** use contractors who hold certification to BS 8522
- **DO** evaluate very carefully the experience and suitability of the proposed contractor(s) by taking up detailed references
- **DO** take references at face value – check them out directly at source
- **DO** ensure that the contractor(s) have made you aware of any exclusions in the contract price and the costs of any extras
- **DO** establish a detailed project budget
- **DON'T** select contractors on price alone



# 4. The Importance of Communication

By communications, we mean all manner and form of dialogue.

Before the move, the very first essential is the briefing of FM personnel at the earliest possible opportunity by senior management or whoever has taken the decision to undertake the move. It is vital, if the project is to proceed smoothly, that the FM is fully aware of all aspects of the proposed move right from the start.

Second, the FM should identify all the key parties to be involved in each phase and should nominate individuals who will be the links to their own teams, their colleagues, their department or their contractor colleagues. These people must be briefed in detail on their roles and responsibilities, the expected timescales and the fallback plans in case things go wrong. They must understand the importance of communicating upwards and downwards within the project team, especially if a part of the work falls behind schedule and may impact upon some other aspect of the move.

Third, but no less important, it is of paramount importance to brief adequately all the personnel who may be affected by the move, for example office personnel whose workstations and equipment are being transferred, whether it be across the country or just to another area within the existing premises. Staff should be encouraged to pack/unpack their own desk contents and their personal property, and they should be fully informed about the materials that will be provided for them, the timescales they should observe, what to do and when.

It is also important to inform neighbouring organisations or residents at all locations regarding the planned activity and possible inconvenience. You may find that they too are planning some kind of activity during your proposed project timetable and discussing your mutual plans will avoid conflict. In any event it is good practice to make contact; it will help to build relations for the future.

## DOs and DON'Ts

- **DO** communicate with neighbours at the old and new locations to ensure good relations
- **DO** set up a central point for communications and give the details to all concerned
- **DO** set up a project management team and ensure that everybody knows who they are and their roles in the project



It is vital, if the project is to proceed smoothly, that the FM is fully aware of all aspects of the proposed move right from the start.



## Keep In Touch With Movers

The most important element of communications is between the FM and the movers themselves, whether these be in-house maintenance personnel or the commercial moving contractor. Every move is different but there are some constants that will apply on every occasion. Crews must be given detailed instructions on what is to be packed and how, on what is to be moved and what is to stay, on any special handling requirements and/or access difficulties, what is to be placed where at the new location, what degree of unpacking and setting up is required and the timing of each phase of the work. Wherever possible, these instructions should be in writing, clearly laid out so that there can be no misunderstandings.

To complement face-to-face briefing meetings in advance of the move, there should also be means of communication between the parties during the move. Typically this will be by landline and/or mobile phone including text messaging.

It goes without saying that all team leaders should have the contact details of all their peers and the project managers up to and including the FM.

The FM (or appointed project manager) is undoubtedly the focal point for all critical planning and decision-making and it is vital that there is a central point of contact that is known to all parties involved in the move. This may be at the existing location or at the new premises but the key point is that this person should be contactable at all times, preferably with nominated deputies in case of unavoidable absence.

Contact details should also be readily accessible for specialists who may have a vital role to play in the event of a breakdown in service equipment.

Lift engineers should be pre-advised so that they may be on standby. It is not uncommon for lifts to be overloaded during a move, and therefore to fail. Everything comes to a standstill, perhaps for hours, while an engineer is located and travels to site. Sometimes it can be a simple matter of finding a reset button, which can be done after a quick call to an engineer for advice. But if his phone number is not known, this can take hours. With planning and forethought, such downtime can be minimised. The same measures apply for electricians, access control technicians, IT support personnel, and others according to the circumstances of the move. Details for all such key support persons must be gathered and those persons should be placed on standby in case of need.

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It is vital that there is a central point of contact that is known to all parties involved in the move.



# 5. Ensure Clear Labelling

This may seem an obvious part of the exercise. However, it is a critically important aspect of every relocation project and can make or break its successful outcome.

Once the space planning is complete, the areas have been defined and decisions have been made about who will sit where, where each cabinet, workbench, seating unit will be placed, then a colour-coded zoning system can be drawn up and labels produced in sufficient quantities to designate the destination of every single item to be moved.

This should not be done with an improvised system of Post-it or mailing labels. Recyclable wipe-off labels can seem attractive from an environmental point of view but unless they are very carefully administered they can lead to chaos if the details from a previous move or phase are not fully removed before re-use. If you have appointed a commercial moving firm, it will be a fundamental part of their management of the move, probably using low-tack labels.

Your role, and that of your personnel, will be to use the provided labels meticulously in strict accordance with the location plan for the new premises, for example, by the use of colour coding, zoning of

areas, floor levels and departments. If, during packing and pre-move preparation, somebody runs out of their allocated type or colour of labels, do not allow them to 'borrow' some from the department next door! Make sure that the labels are firmly affixed and in the right location on the item, as advised by the moving firm.

Equally, following completion of the move, all labels should be removed promptly as not only are they unsightly but even the "low-tack" versions can sometimes leave deposits on certain materials or finishes which can be difficult or even impossible to remove, leaving a permanent blemish.

## Attention Needed

Proper attention to labelling will pay massive dividends during the delivery and setup phases. Unlabelled or mislabelled items will almost certainly end up in the wrong place, maybe even hundreds of miles away from where they should be, and will cause havoc and potentially additional cost. It is advisable to allocate a holding area at the destination for all unlabelled items; this will assist staff in finding their "lost property" when they arrive at their new workplace.

### DOs and DON'Ts

- **DO** use a proper labelling system reflecting the new floor plans and not an informal arrangement of stickers
- **DO** ensure that all labelling is carried out meticulously in accordance with the location plans
- **DO** ensure that every crate is labelled according to its destination
- **DON'T** allow crates to sit around after the move unless they are definitely required

# 6. Provision of Crates

Crates (and associated equipment such as roll-cages) play an essential role in every move. There is an increasing variety available and while the majority are general-purpose such as for desk contents and paperwork, other designs have specific purposes, for example, for flat screens, and some are fully lockable while most can simply be secured with numbered plastic seals.

If you have regular internal moves you may already have some crates of your own, but for a major relocation you will almost certainly have to hire more. You might think that it would make sense to arrange this yourself directly with one of the specialist crate hire companies but this can lead to problems as you may easily under-estimate (or overstate) the quantity required, or misjudge the stages of the move at which you will need them. You will also be directly responsible for any losses or charges for delayed return.

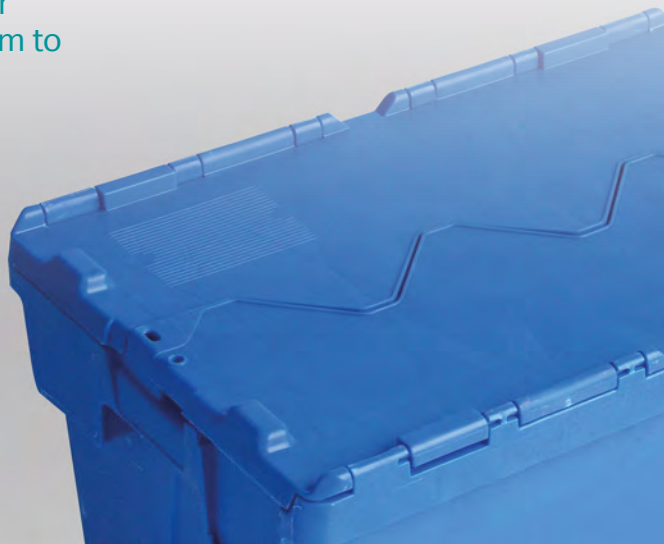


**The contractor will have its own stock of crates and even if it needs to source additional types or quantities it is far better to leave this to them to arrange.**

## Trust Your Contractor

The contractor will assess the quantities and types required during the pre-move survey and although you may be surprised at the number he suggests or the proposed timing for collection and delivery, you should trust his judgement as he will have gone through this process many times before. The contractor will have his own stock of crates and even if he needs to source additional types or quantities to meet your needs, it is far better to leave this to him to arrange. He will bring them in as needed, remove them when no longer required, and will keep account of the quantities still “out on hire” and will provide you with regular reports to enable you to oversee the emptying and return of crates that are still in use after delivery to the new location.

Always remember however, by whichever means you arrange the crates, ultimately you the customer will be responsible for any losses or retention charges. Make sure that you know the relevant terms in advance, and negotiate the most generous deal that you can, which may be as part of an all-in price.



# 7. Insurance

Everyone enters into a move hoping that everything will proceed smoothly and without incident, but even with the greatest care, unexplained losses and accidents can happen. It is essential that adequate insurance cover is in place for the duration of the move.

Larger organisations may have an in-house risk manager who will be able to liaise with the FM and confirm whether the existing policies already cover the specific risks of the move, or that extensions can be arranged.

If cover is not already in place, it is essential that it be arranged through the contractor who is carrying out the move. It should be a condition of tender that the contractors are able to provide the required levels of cover. The advantage is that it will be a specialist Goods in Transit policy designed especially to cover the risks of a move. By placing the responsibility with the contractor, you will achieve more of a “one-stop-shopping” position in the event of a claim becoming necessary.

The insurance policies should cover not only the company property being moved but also any damage caused by the contractor to the premises at all locations involved, the personal property and effects of employees (unless the organisation has a

corporate policy that such items are not covered and will remain the responsibility of the individual owners) and also, critically, public liability to cover possible injury to third parties or damage to their property.

## Terms and conditions

Check the terms and conditions of the policy and ensure that any special conditions are observed (or waived, by negotiation or by payment of additional premium).

For example, some policies may seek to exclude cover for property in vehicles or buildings that are unattended (even temporarily), a risk that can easily and unintentionally arise during a move unless strict precautions are followed. Equally, many policies will exclude ‘unexplained or mysterious disappearance’ where there is no evidence of break-in or theft, but items simply cannot be found and there is no apparent cause for their loss.



**Many policies will exclude ‘unexplained or mysterious disappearance’ where there is no evidence of break-in or theft.**



Subject to the activities of your organisation it is possible that there may be certain items of particularly high value or of a very fragile nature, possibly rare or even irreplaceable, or delicate electronic equipment, or hazardous materials. Cover for such items can be very difficult and/or expensive to arrange and it may be tempting to take one's own risk rather than pay a high premium. However, this could be a high-risk strategy and should not be considered unless such a decision is taken (and preferably confirmed in writing) by a suitably authorised senior officer of the organisation.

Some contractors may offer another form of cover which is not actually insurance, although it may have all the appearances of it, and they may describe it in very similar terms. This is known as Liability Cover,

under which the contractor assumes liability himself, having taken out his own insurance to protect himself against any claims.

All CMG Members can evidence appropriate insurance protection for their business responsibilities and of course their clients' move programmes.

## DOs and DON'Ts

- **DO** ensure that adequate insurance cover is in place, either internally or through the contractor
- **DO** ensure that Risk Assessments are carried out and acted upon



# 8. Health & Safety

If the FM is not already responsible for health and safety then liaison with the designated Health and Safety Officer should commence at an early stage. If there is insufficient expertise internally, advice should be sought from external specialists.

Risk assessment is the key to success. If a commercial moving contractor is being engaged, they should be involved jointly with the organisation's own risk assessor (or the external consultant where applicable).

The fundamentals are: the premises within which the property is to be moved and the nature of the goods involved, especially where these include high-risk, valuable or fragile items or hazardous goods requiring special handling.

Sometimes the premises themselves will present difficulties as found in older city buildings with many floors, small lifts or those with only passenger-carrying capacity, narrow stairways, uneven steps or slippery floors. Heavy or large items such as safes may need to be lowered and raised at high level with outside elevators, requiring safe working space. There may be very little space for goods-carrying vehicles to park for loading and unloading; there may be constant passers-by on pavements, or traffic on narrow streets immediately outside doorways.

The above are just a few examples of the hazards that can exist and which are merely slight inconveniences in normal daily life, but which can cause severe disruption to a commercial move especially when the schedule is tight.

Therefore, full and detailed risk assessment of all the stages of a move and each location is critical and even if word is received during project planning that certain premises are easily accessible and will not present any problems, the responsible FM should always ensure that a qualified risk assessor carries out an inspection to make sure. It can be surprising how often some small, detailed potential complication can be overlooked, especially by those familiar with a building.

During the move itself, especially out of normal working hours, there can be an increased risk of personal accident. It may be something minor such as a finger cut on a sharp piece of metal furniture, or more serious such as a hand or foot trapped under a heavy item. When IT/electrical equipment is being dismantled or re-commissioned clearly there is the risk of electrocution. Accordingly, first-aiders should be on call and team leaders should be briefed as to whom they should contact in the event of an accident.



**It can be surprising how often some potential complication can be overlooked, especially by those familiar with a building.**

# 9. Security

Whether it is a small internal repositioning of workstations carried out by in-house personnel or a multi-phase move carried out by contractors between several locations, security must always be a concern and the appropriate precautions must be taken.

Opportunist thieves are becoming ever bolder and need no invitation to an open door to an unattended building or vehicle where items are clearly visible and easily removed. The situation is often compounded by the fact that many moves take place outside normal working hours, often at weekends and through the hours of darkness, allowing even greater opportunities for theft.

Although CCTV can be useful as a deterrent and of course in providing evidence after the event, there is no substitute for a manned presence at points of entry and exit. Even if a move is entrusted entirely in all other respects to a contractor, it can be beneficial for the organisation to maintain at least some involvement – perhaps in just a supervisory role - in the form of in-house or contracted security guards or the “conciierge” at managed premises, at each gateway, doorway, loading/unloading point or other “soft” spot.

As a move progresses and particularly when it is dark and the weather is inclement, personnel become tired and bored with standing at a doorway where nothing much is happening and there is a great temptation to leave and do something more interesting or simply to go inside and chat with colleagues. This is when supervision becomes important, to ensure that security does not lapse. Spot checks and visits by one of the project managers will keep people on their toes and ensure that they do not leave their stations unattended.

Identification of authorised personnel is important. Professional thieves may arrive in a suitable-looking vehicle, wearing uniform of an adequate appearance, and with sufficient boldness and confidence they can talk their way through a casual security check and then uplift considerable quantities of property without suspicion. Especially where vulnerable/high value goods are concerned an organisation must take sufficient measures to prevent this, such as photo-ID badges, pre-advised names of each foreman and team member and security screening in advance of the move.

In certain environments, for example museums, galleries, laboratories and research establishments, the property to be moved may be of exceptional value and/or sensitivity and security may therefore be an especially important consideration requiring even more careful planning than the measures described above.

In particular, there may be concerns over the personnel to be deployed on the move and in such cases it will be helpful to refer to detailed guidance on the subject. See BS 7858:2012 – Security screening of individuals employed in a security environment – Code of practice.

## DOs and DON'Ts

- **DO** be alert to security risks and arrange protection as necessary
- **DO** carry out a post-move review and follow up any issues promptly



# 10. Post Move Completion

Following the move, it is not uncommon for some items not to be in their exact allotted location, which provides the opportunity to assess how professional your commercial mover is.

At this point you might undertake a 'floor walk' of the site with the team leader and one or more team members, asking them if they are happy with the positioning of furniture, if all the crates are in the right place, if the IT is ready for recommissioning,

and to generally confirm the mover has carried out the move to your satisfaction. This is part of the BS8522 quality standard that all CMG Members hold, with this procedure promoted as good practice.

The team leader will then explain the best method for crate returns, prior to the move/relocation being signed off and any feedback provided.



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# Notes

A series of horizontal dotted lines for taking notes.



# About Universal Commercial Relocation

Based in Greater London, **Universal Commercial Relocation** is an award – winning office removals and storage company, specialising in workplace move management, relocation and delivery services. Winner of the British Association of Removers' Commercial Mover of the Year in 2015, 2017 and 2019, Universal delivers cost effective and bespoke solutions so your business can plan and move with maximum efficiency and minimal disruption and risk.

## About CMG

The Commercial Moving Group (CMG) is a specialist sub group of the British Association of Removers (BAR) that was set up to provide a wide range of moving services for commercial and office relocations. All CMG Members can demonstrate this dedication by working towards and successfully attaining BS 8522 - the British Standard for Commercial Moving.



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