

Moving Your Law Firm: A Survivor's Guide
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As an active member of WALA since 1994, I've heard fellow legal administrators talk about the horrors of moving a law firm. Listening to the stories of moves gone bad, I would nod sympathetically and offer words of comfort while secretly feeling thankful I would never have to go through a law firm move...or so I thought. Life sometimes throws a curve ball. Our firm's curve ball came when Dane County decided the building we had a long-term lease in would be the perfect site for a new courthouse. As a survivor of a law firm relocation, I hope to share with you some of what I learned. Since we did not have a choice about moving, this article will not focus on the planning involved in determining if your firm is ready to relocate, but rather will focus on how to survive the relocation itself.

It's Never too Early to Plan

Begin planning immediately; a year in advance if possible. Talk with your partners if they have gone through a move and find out what went well and what didn't go so well. Research the internet and be sure to use ALA's Management SolutionsSM for tips on office moving. Fellow WALA members are also a great source of information. If your office is large, you may want to create a moving committee to help divide some of the responsibilities. It is a good idea to develop a moving budget to help keep things in check throughout the relocation.

Find and Prepare Your New Home

Well, it is sort of like home away from home. Develop criteria for the new facility and identify properties that meet those criteria. Working with a commercial real estate broker can be very helpful during this process. After locating a building with space that most closely matches your needs, lease negotiations can begin. A rough "build-out" plan for the new space may be needed so the management company can see the type of changes to be made to the space. The management company may have their contractor help prepare this or you may choose to work with an architect, which is what we did. Either way, it is helpful to rough out a drawing of how you and the partners envision the office to give to whomever is preparing the plans. Request that whomever prepares the plans assign each office/workstation/general area a number. This will be a huge help later when labeling moving boxes or telling a contractor where something is to be installed.

At this stage, you should be ready to begin lease negotiations. Once an agreement regarding square footage cost, length of lease and renewal terms has been reached, the lease document itself will be prepared. Be sure to allow ample time for this process as drafts will likely be exchanged several times. Upon receipt of the initial draft, carefully review the lease and perhaps compare it to the current lease. Your firm may want to consider hiring outside counsel to review the lease. Once the lease terms are acceptable, the office layout can be finalized with the architect and contractor. Be sure this is completed early enough so the contractor can finish your space on time. Your planning will revolve around the space being ready on move-in day. Use all

your powers to get the plans finalized so the contractor has at least one week to spare (and possibly more if you need to allow time for installation of new modular furniture).

During the time the plans are being finalized, discuss and plan for any new furniture and equipment purchases. The relocation budget will help keep things in check during this process. New furniture and equipment should be ordered far enough in advance that it can be delivered and installed prior to the move in date. Finding a furniture vendor who can work with the firm in creating the type of office atmosphere your firm wants is very helpful. If some of the firm's old furniture will be used, plan where everything will go at the new location and make sure everything that is being moved fits in the space before plans are finalized. Using the services of an interior designer can help pull everything together.

When the final blue print of the office layout is completed, request a smaller copy (I found the 8 ½ x 11 size to be the most useful) for later use. More on this to follow, but now it's time to think about selecting a mover and preparing for the move.

Preparing for the Move

About four to six months before the move, meet with movers to perform on-site visits of your old location. We received quotes from three movers and found quite a difference in the types of services each moving company offered. Carefully identify what the mover will and won't be responsible for moving and/or packing. Be sure to find out if moving supplies are included in the quote (packing tape, labels, boxes, moving crates, library book carts, picture moving carts, etc.). The moving company may offer additional insurance to protect against damage not only to items being moved, but also to the old and new locations. Finding a good mover can make a big difference; if they don't have enough employees or trucks on moving day, your move won't proceed as planned. Check references and ask around for referrals to find a moving company that takes the move as seriously as you do.

While identifying items to be moved, it is a good time to think about items the firm wants to either sell or donate. This is the time to clean out those storage areas. If some furniture to be donated will be needed by the firm up to the date of the move, coordinate a pick up date that will work with this. Begin encouraging employees to clean up their work areas in preparation for the move.

Contact all vendors so everyone is notified of the move well in advance (4-6 months). The voice/data wiring at the new office will need to be coordinated and installed after the walls are framed but prior to dry wall installation. If the firm's voice/data vendors do not provide cabling service, voice/data cabling companies will need to be interviewed and hired. Determine if any existing voice/data equipment needs to be upgraded or if old equipment will be moved. If upgrading is necessary, make arrangements for the upgrade. If not, find out about downtime (how long to take apart and set up voice/data equipment at the new location). Clearly state what is needed from your vendors to make the move proceed as planned and find out what they need from you. Determine if the voice/data vendors will be moving the phone and computer equipment or if the moving company will be handling this.

Contact the company that provides telephone service to your firm and make arrangements for a new telephone number. If the firm's telephone number does not need to change (as was our case), find out if dual service is possible for a few days. If you have a DSL or ISDN line, make arrangements for the new line. In my experience, I have found DSL lines can take up to 4-5 weeks for installation so pre-planning is very important.

If the service the vendor provides to your firm is a "mission critical" service, put the plan for the move in writing so responsibilities are clearly outlined.

Remember that 8 ½ x 11 plan I mentioned earlier? Now is the time to start using it. You will be able to give each vendor a copy of the plan with notations on the plan relevant to the vendor. Copies of the plan can also be given to the movers and anyone else involved in the move.

Most movers will handle general office equipment, but special arrangements need to be made for copiers. Contact your copy machine supplier and find out what arrangements are needed to prepare the copy machine for relocation. Once the machine is in the new location, a service technician will need to prepare the copiers for use. If your firm has leased equipment, some leasing companies require advance notification of the move.

Be sure to notify the coffee service vendor of the move. If there will be water lines to coffee machines at the new location, your coffee vendor will also want access after framing and before drywall to coordinate this with the plumber.

Discuss move dates with current and new building management to determine after hours and weekend building and elevator access.

Details, details...

With all these other items on your plate, it is easy to forget some of the details. Be sure to complete a change of address with the post-office. Clients also need to be notified of the impending move. A moving announcement can be enclosed with billing statements beginning several months in advance of the move. This announcement can be used in other office and client mailings as you approach the move date. It can also be handed to those who visit the firm beginning several months in advance. A few weeks prior to the move, mail move announcements to the firm's bank, vendors, attorneys, judges, the State Bar, etc.

A meeting with the firm's insurance company prior to the move might be necessary to update coverage as needed. Review your new lease to find out if the minimum insurance requirements are higher than the office's old lease. If necessary, notify utility companies at old and new locations. Order new stationery, checks, firm brochures, bank deposit tickets, etc. If the firm has a web page it should contain a move announcement and be updated once the move is completed. Contact management at the new building to order the firm's name plate (and individual attorney nameplates if applicable) for the new office's lobby/entry way.

I found it helpful to keep a large binder of all the information regarding the move, including color choices, office furniture plans, contact phone numbers, electrical/voice data wiring plans, etc. A calendar and checklist can be maintained and kept in the binder for reference. During the final weeks before the move, the calendar will be indispensable.

The Final Countdown

Take a deep breath. This is where all your careful planning will pay off.

During the last few weeks, stay in contact with vendors involved in the move process to finalize last details and confirm arrangements. The contractor will likely be in constant contact during this time period. If the firm needs to close for a day (as we did), one way to make use of the time is to have training sessions for attorneys and staff that don't need to be at the office on the actual day of the move.

The move schedule should include a weekend the firm has set aside for packing at least one week prior to the move. We did this on a Saturday and called it "Pizza and Packing Saturday". The firm springs for the pizza. In advance of any packing, distribute boxes and packing supplies to all employees. Everyone should have a copy of the new space plan so they can see the office/workstation number to assign to the boxes they are packing. Each box should be assigned a location number and box number. Also, each office item that isn't packed in a box should be labeled with the location number. Distribute inventory forms for people to keep a brief summary of what was in each box (very helpful when something is needed in a hurry). We also had a final pack/pizza night the evening before the move for people to pack up their final items. In addition to staff who were very involved in the move, we asked for volunteers to help pack the night before the move.

At the new location, hang signs in each area with location numbers that correspond to the map you distributed. Be sure to get copies of keys for the new location, along with any parking permits and other security information.

On the day of the move, at least one employee should be at the old location and one at the new location to direct movers. It is helpful to have cell phones to stay in touch with each location if the voice equipment is in the process of being moved. Schedule a walk through at both locations after the move to check for any damage and to be sure the old location is left in the condition your old lease requires. You may need to schedule cleaning/painting, etc., of the old location and the new location to touch up wall dings.

On the day your office re-opens, here are some ideas to help employees feel welcome: On each desk have a welcome packet with an updated telephone list, an 8 ½ x 11 map (like you used for the vendors) of the new office with the faxes/printers/copiers highlighted, along with any other pertinent office information. We also had a small bud vase and flower on each employee's desk with a note from the partners welcoming them to their new office.

Throughout the moving process, I recommend that management involve employees as much as

possible. People tend to have a more positive attitude if they are kept informed of the move process and are involved in decisions whenever possible. Ask a secretary what does and doesn't work about a copy room. Perhaps a waist high counter would be easier to stand and prepare work at. Our modular furniture representative met with employees to find out what they liked and didn't like about workstations. Try to find time in your hectic schedule to arrange a few tours of the new office as it nears completion. Notify the construction foreman so his crew can be prepared for your arrival. Employees really enjoy this and it is worth the effort. Give everyone a copy of the 8 ½ by 11 space plan so they can visualize the end result.

In conclusion, careful planning is the key to a successful move. I was fortunate to have co-workers who were there to help during the move and partners who made decisions quickly and stood by the decisions I made on my own. We had excellent vendors to provide support and troubleshoot when problems arose. These things, combined with the planning detailed in this article, helped our firm survive the move. Not that I don't have at least a few stories that I can share with you at a WALA gathering...

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