



RELOCATION PLANNING TIPS

SUCCESS TOOLS FOR SMALL BUSINESS GROWTH

The City of Bellevue works with local businesses to preserve and expand the small business community. Sometimes business growth requires relocation. Relocation is one of the most difficult challenges many businesses will face. This document is produced with those needs in mind. Please feel free to contact staff at the Office of Economic Development to inquire about other services and information.

Choosing a business location requires consideration of a broad range of factors, from local zoning and tax laws to the accessibility of your business to customers and employees. The following checklist includes several questions you should answer before making your ultimate decision on where to open your business.

The needs of every business are different. This checklist is only one example of how to manage the needs of small businesses such as in a neighborhood trade area. Actual business needs will vary depending on particular circumstances, market factors, size of business, and zoning requirements specific to that particular location. Be careful to factor in your own special circumstances, which do not necessarily appear on this list.

CHOOSING A BUSINESS LOCATION – Part A. SELF-ASSESSMENT

Business and Location Needs:

1. Is the area zoned for this type of business?
yes no
2. Are qualified employees available in the area?
yes no
3. Is the site close to the markets served by the business?
yes no
4. Are any competitors in the area?
yes no
5. Are the inventories and supplies that the business needs available in the area?
yes no
6. Can suppliers conveniently make deliveries to this area?
yes no
7. Is public transportation accessible?
yes no
8. Are the utilities needed to run the business available?
yes no
9. Are there facilities nearby for transporting goods?
yes no

10. Are the rates for transporting goods similar to or lower than in other areas?
yes no
11. Does the cost of this facility in this location compare favorably with other areas? yes
no
12. Do the taxes on this facility compare favorably with other areas?
yes no
13. Do the taxes on the business compare favorably to those in other areas?
yes no
14. Is the area suitable for expansion in the future?
yes no
15. Are there adequate parking facilities for customers?
yes no
16. Are there adequate parking facilities for employees?
yes no
17. Is the traffic in the area compatible with this type of business?
yes no
18. Are the wage scales in this area similar to or lower than other areas?
yes no
19. Is this a safe area for employees, suppliers, and clients?
yes no

Your Competitive Market Environment:

1. Have you evaluated key economic trends and how they will affect your business?
yes no
2. Have you evaluated key technological trends and how they will affect your business?
yes no
3. Have you evaluated key sociopolitical trends and how they will affect your business?
yes no
4. Have you evaluated key demographic and lifestyle trends and how they will affect your business?
yes no
5. Have you identified changes in your company's target market?
yes no
6. Have you researched your target customers enough to know their likes, dislikes, wants, needs, and preferences?
yes no
7. Have you determined the level of satisfaction your target customers have with existing products or services?
yes no
8. Have you defined how you will create value for your customers?
yes no
9. Do you know why your customers will want to buy your company's product or service?
yes no

What else is most important to you in operating your business?

NOTES: _____

CHOOSING A BUSINESS LOCATION – Part B. CHECKLIST

Weeks before move: 16-8 | 7 | 6 | 5 | 4 | 3 | 2 | 1 | Moving Week

As soon as Move is Known:

To Do: Try to accomplish the tasks on this list at least 8 weeks before you move. If you are moving in less than 8 weeks, you will want to make sure that these tasks are accomplished as soon as possible!

- Prepare a plan and budget for the move.
- Contact your bank, SBA or organizations such as Community Capital Development in Seattle for help in cash need, move cost, expansion funding, equipment funding or other financial needs.

8-16 Weeks before Move:

To Do: Try to accomplish the tasks on this list at least 8 weeks before you move. If you are moving in less than 8 weeks, you will want to make sure that these tasks are accomplished as soon as possible!

- Check your credit! If leasing your new commercial space, try to obtain a current credit report to give to potential landlords. If purchasing a commercial space, be sure to check on your credit report to make sure there are no errors!
- Talk to your tax advisor about your move. Your moving expenses may be tax-deductible.
- Look into getting moving and/or storage insurance to cover your items during the move.

Using a Mover: Try to shop around as much as possible to get the best rates. Use Yahoo! Real Estate to get estimates from moving companies.

Self Move: Choose a rental truck to use. Be sure to reserve it well in advance since reservations fill up quickly at certain times of the year.

7 Weeks before Move:

To Do: Try to accomplish the tasks on this list at least 7 weeks before you move. If you are moving in less than 7 weeks, you will want to make sure that these tasks are accomplished as soon as possible!

- Make a Moving File to store receipts, records, and important papers related to your move.

- Begin removing unwanted or unneeded items from your backrooms, above shelf space and under shelf spaces, attic, garage, basement, or storage. Plan to donate, sell them, move them or take them to the waste disposal site. Check to make sure you have returned all borrowed items including video rentals and library books.
- Gather important documents (business license, professional certificates, health, liquor, safety or other inspection reports, appraisals, required records etc.) and place them in a briefcase, strongbox, or other secure place to insure that they do not get misplaced during the move.

Using a Mover: Get in touch with a moving company and set a date for the move. Fill out any necessary paperwork, and be sure to get moving insurance if you need it.

6 Weeks before Move:

To Do: Try to accomplish the tasks on this list at least 6 weeks before you move. If you are moving in less than 6 weeks, you will want to make sure that these tasks are accomplished as soon as possible!

- Make item donations. Remember to collect receipts for tax purposes
- Sell your old and unwanted stuff or add to a personal garage sale before you pack. Several on line websites are good places to list use items for sale to turn them into cash.
- Notify and or Update your vehicle registrations, auto insurance, health insurance liability insurance, and any other service providers. Forward or cancel any monthly services, subscriptions or memberships.

5 Weeks before Move:

To Do: Try to accomplish the tasks on this list at least 5 weeks before you move. If you are moving in less than 5 weeks, you will want to make sure that these tasks are accomplished as soon as possible!

- Prepare a detailed plan or spreadsheet for all of the previous and all of the planned efforts, including technology plans for communications, computers, cable, advertising, signs, etc.
- Set up contacts for all service providers needing access and coordinate with new landlord.
- Set up calendar schedule for services, events and other “To Do” items needed for move day. Print out the schedule with extra copies to share with others, include your new address, email and telephone contacts on the calendar, share with service providers.
- Review the previous activities, the planned activities and try to begin thinking of the little things needing attention you may have forgotten.

4 Weeks before Move:

To Do: Try to accomplish the tasks on this list at least 4 weeks before you move. If you are moving in less than 4 weeks, you will want to make sure that these tasks are accomplished as soon as possible!

- Fill out an official change of address with the USPS, FEDX, DHL, messenger services, or others..
- Notify all important business and personal contacts of your new address. Fill out changes of address for creditors and magazine subscriptions. Make sure to include associations, professional organizations and others.
- Leave a forwarding address for the next tenants of your location or plan on securing a sign posting referral..
- Make a communications, computer connections, cable connections, Internet connections, and other automation plan for the new location. Set up tentative installation dates and task lists.

Self Move: Buy boxes and packing materials.

3 Weeks before Move:

To Do: Try to accomplish the tasks on this list at least 3 weeks before you move. If you are moving in less than 3 weeks, you will want to make sure that these tasks are accomplished as soon as possible!

- Start packing. Begin with rooms you don't use as much and finish with the room of most use and customer entrance. Choose a room of the business to serve as a temporary storage area for packed boxes. Check with your mover for "how to pack information" to learn "how to pack like a professional".
- Check into storage options for those items you cannot move immediately and may need to store temporarily.
- Make an inventory of important and/or expensive items in your business as you pack. Try to take photographs of these items if possible. You may need this inventory for insurance purposes in case items get lost or damaged in the move.

2 Weeks before Move:

To Do: Try to accomplish the tasks on this list at least 2 weeks before you move. If you are moving in less than 2 weeks, you will want to make sure that these tasks are accomplished as soon as possible!

- If you operate from a multi-story building be sure to reserve an elevator for the day of your move.
- Close any local bank accounts and open new ones in your new location. Try to get checks printed with your new address as soon as possible.
- Drain gas from any gas powered equipment before you pack it up. Try to make disposal arrangements for any oil, gas, or other hazardous substances you will not be able to move, use, or throw away.

1 Week before Move:

To Do: Try to accomplish the tasks on this list at least 1 week before you move. If you are moving in less than 1 week, you will want to make sure that these tasks are accomplished as soon as possible!

- Make backup copies of important files on your computer before packing it up.
- Have a party to use up perishable food items, beverages, and alcohol. Donate food items you don't consume to a shelter or food bank.
- Confirm any moving day plans or reservations you may have made for moving day (rental vehicles etc).

Using a Mover: Confirm arrangements with your moving company

Moving Week:

To Do: Congratulations! You've made it to Moving week! Be sure that all the tasks from the 8 previous weeks are completed, and print this list out to use even after you have packed your computer. Good luck with your move!

- Be sure to have some cash on hand for the day of the move. You may need it to tip movers, buy snacks, etc... If you are moving out-of-state, keep in mind that many businesses do not take out-of-state checks.
- Finish packing.
- Begin cleaning your office. Make sure you defrost any refrigerator and freezer.
- Do a final walk-through of your old office, checking closets, drawers, under stair storage, ceiling storage. Lofts, back corners etc. Turn off all lights, lock all doors and windows, and leave keys with your old property manager if applicable.

Self Move: Pick up your rental truck and any moving equipment you may need (dollies, carts, furniture pads, etc...)

- You are ultimately responsible for how your goods are packed and loaded in your trailer. Personally supervise hired labor.
- Load your goods in a pre-designated order, saving "last load" items for the rear of your shipment. This might include your vacuum cleaner or telephones
- Check every room, closet and cabinet one last time before deciding everything is loaded.
- Take note of utility meter readings.
- Leave a note with your new address in the office and on the door so that future inquiries can forward any stray mail or deliveries or go to your new location.
- Keep family and associates informed of your plans and "whereabouts" in case of an emergency or unforeseen event. Make sure your cell phone is charged.

Moving In

- You are likely to arrive at your new office or business location ahead of your shipment. Take this time to look things over and to ensure your new utilities have been connected.
- Check appliances and systems to ensure all are working properly, and arrange for repairs if necessary.
- Check to see if mail is making it to your new address or pick up any mail being held.
- Consider drawing out your new floor plan and decide where you want furniture and equipment placed.
- Have any payments ready for vehicles, drivers or labor.
- After your goods are unloaded, return any rented vehicles or free up any drivers or labor as soon as possible.

After the Move

- Keep all receipts and documentation in your move file and store the file in a safe place. Be sure to include receipts for any cash payments, checks or credit card slips. You'll be glad to have everything in one place at tax time.
- Get a new licenses and new tags for yourself or vehicles as needed.
- Contact the local paper for a new subscription.
- Confirm that any advertising previously arranged is being executed on time
- Put up a large, temporary, new "open for business" sign.

CHECKLIST AT-A-GLANCE

Working Days

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19
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Pre-Move Plan

- Plan and map out business changes
- Project planning and Needs analysis

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Move Plan

- Design Move plan
- Select and coordinate move management team
- Furniture Survey

Vendor Selection

- Selecting Movers
- Selection of office\Real Estate
- Office supplies and Furniture vendor selection

Communication Plan

- Employee communication
- Employee Top Concerns to be considered
- Data and Telecommunication

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Move

- On-Site Move supervision
- Furniture Move
- Installing
- Office Interior Decoration

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Post-Move

- Evaluation
- Hands-Over
- Move Project Closure
- Support

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Helpful Tips

- See List of Critical Items

Disclaimer: Information summarized in this document was taken from descriptions of common restaurant practices publicly available from a variety of sources including individual texts, past experience of the parties and the National Restaurant Association (NRE) and that were sources that are believed to be accurate and reliable and under no circumstances should be construed as paid consulting advice for which any liability would exist for any participating individual or organization. Readers of this document are strongly advised to seek the advice of their accounting, legal and operational professional(s) before proceeding with any changes, expenses or commitments to an activity or action resulting from use of this document.

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