Best Practices for Move Management
by Michael Schley
Introduction

Modern organizations are in a constant state of change. As organizations expand, contract, merge, divest, promote, reorganize and re-engineer there is a need to move people and departments. The typical modern organization will move at least half of its employees each year and that rate can often be much higher.

From a facility manager’s perspective, a major portion of a facility department’s time is devoted to move management. The importance of a well-run move process is clear.

From an employee’s perspective, frequent moves are disruptive and it is important that the process be as smooth as possible.
Understanding Moves In Today’s Environment

Moves involve many people and require a significant amount of communication between involved parties. At a high level, all moves follow the same overall process:

**Request Management**
Move requests identify which employees must move, when they need to move and what large-scale projects are in the works.

**Planning**
Before the move starts, move planning entails high-level coordination with internal customers and groups that support the move process such as HR, IT, facilities and telecom groups.

**Coordination**
During the move process move coordination means getting the right information at the right time to internal and external vendors and groups to ensure the move occurs in the proper order and on time.

**Analysis**
Using data from a move management system to analyze the effectiveness of move processes is essential. It is useful to look at facility resources required, service provider costs, customer satisfaction, time required to undertake moves and the number of incidents requiring call-backs.

Historically, move management was a manual or semi-manual process. Moves were planned by marking up printed floor plans and coordinated through numerous meetings and emails. This led to imperfect communication, errors and limited analytical data. With the advent of modern Integrated Workplace Management Systems (IWMS), the move process has become automated. This results in better communication, fewer mistakes and the ability to analyze the move process using data.

Electronic systems also facilitate better collaboration between departments involved in the move process. As organizations move toward self-service models for corporate services, providing employees and departments with the ability to make requests through a web portal is important.
Benefits of Move Management
A good move process achieves three goals:

**Efficiency**
By coordinating the work of multiple departments, moves can be achieved with a minimum of wasted effort and error.

**Minimized Disruption**
A well-run move process minimizes employee downtime. Ideally employees should be able to be productive immediately after a move and reduce time needed for move preparation or move “recovery.”

**Collaboration**
Today’s office moves require collaboration between multiple service groups. Although facility departments serve as primary organizers, IT, Human Resources and Security departments all play major roles and must be seamlessly coordinated.

Move Management Terms

1. **Move, Add, Change (MAC)** - This term is often used as a reference to the move process.
2. **Restack** - Major relocation of departments within a building or set of buildings.
3. **Swing Space** - A location that is used to house a department temporarily while they await availability of their final location.
4. **On-board** - The facility processes related to a new employee being hired.
5. **Off-board** - The facility processes related to an employee leaving an organization.
6. **Scenario Planning (“Test fit”)** - The practice of planning a move tentatively in order to understand if the available space fits the requirements.
7. **Churn** - The percentage of people being moved in a given year.
8. **Move Project** - A project that includes a number of related individual moves and tasks.
Move Workflow

Move management is a classic business workflow activity. Workflows can be understood by looking at:

- Roles
- Tasks and Activities
- Schedules
- Sequencing and Dependencies
- Communication

Defining the move workflow starts with understanding roles. Depending on the size and complexity of the organization, these can vary in number. Here are roles that we at FM:Systems typically see in our work with customers:

- **Move Planner** - This is the person in the facilities department who takes the responsibility for determining the move destinations, the move dates and ensuring that all tasks are complete.

- **Move Technician** – An individual that performs the work involved in a move.

- **Move Liaison or Move Coordinator** – This person works for the department being moved and is the individual who communicates departmental space needs and move requests to the move planner. This individual also coordinates move schedules for the people being moved. Other terms for this role are Move Captain and Departmental Liaison.

- **Move Manager or Move Approver** – Individuals whose jobs entail approval of proposed moves.

- **Move User** – The individual being moved.
**Supporting Services** – These are departments that provide essential services in the move process. Typical service roles include:

- **IT (Information Technology)** – Responsible for ensuring that the employees and departments being moved have the appropriate IT equipment and connectivity to wired and wireless networks.

- **Security** – Responsible for ensuring appropriate building access.

- **Furniture** – Responsible for any furniture that needs to be acquired, moved, reconfigured, repaired or disposed of along with special requirements based on ergonomic or job needs.

- **Mail Room** – Responsible for updating employee location data to ensure delivery of mail and packages.

- **Human Resources** – Responsible for updating HR systems with current employee locations.
Tasks & Activities

Move projects can entail numerous activities, some performed by the facilities department and some performed by others. A list of activities that may be part of the move process is as follows:

- Reconfiguring furniture
- Data cabling and network equipment installation
- Relocation or installation of printers, scanners and multi-function devices
- Changes in employee access and security systems
- Issuing and tracking of keys
- Signage including directional signage and nameplates
- Updating of parking assignments and parking lot passes
- Updating of space management occupant data
- Updating of mailroom occupant location data
- Updating of HR system occupant location data
- Moving of furniture
- Moving of file cabinets and special equipment
- Moving of boxes with personal items
- Moving of special ergonomic chairs
- Communication to occupants during the move process
- Communication to occupants with welcome information for new facilities
- Follow-up communication for satisfaction surveys

The key to good move management is to identify these tasks, assign responsibility for each task and establish a system to ensure that all tasks are completed in a timely manner.
Sharing The Work

The efficiency of the move management process can be improved if tasks and activities are disbursed and delegated to those individuals or department representatives making decisions. For example, establishing move liaisons within each department who can request moves removes decision bottlenecks and improves communication.

Move planning is enhanced with visual planning tools that show occupancy before and after a move and support “drag and drop” move planning. Departmental liaisons can be more effective in their decision-making if they are provided with visual floor plans.

Communication

Good communication is a major factor in customer satisfaction. A good move process will entail relevant communication about key events. These will typically include move dates and new space assignments.

We recommend avoiding the tendency to over-communicate however. Overly-frequent emails that do not convey important information are both annoying to the receiver and can cause important messages to be overlooked.
Integration With Space Management

Move management systems are natural extensions of space management systems. Having accurate occupancy data in the space management system is an essential starting point for move management. In other words, in order to build a “from-to” list, it’s critical to first have correct “from” data. A good move management system will also enhance the space management function by updating occupant locations at the end of a move.

A move management system can also be valuable in maintaining accurate space allocation data. As occupants are moved into or out of a space, the system should automatically update the departmental assignments which in turn drive chargeback processes that allocate facility costs to department.

Integration With Service Request & Asset Management Systems

Often move projects will require additional services such as minor construction, repair or cleaning. It is useful to have the move system integrated with a service request system so that these requests can be easily linked to the moves requested.

Integrating the move system with the asset management system is also useful. The system will already have data on assets associated with a person or location and move instructions for those assets can be easily generated.

An advantage of IWMS is that the systems naturally integrate move management with other facility management functions such as service requests and asset management.

Changes In Move Requests

It is common for key attributes of moves to change during the course of a move project. Workspace assignments, move dates or other attributes can all change before the move happens. It is useful therefore to have a “lock” feature that can be imposed several days before a move to avoid last-minute confusion. There should be an override capability, but locking a move ensures that last minute changes won’t be made casually and that the move team avoids overlooking important information.
Approvals

A benefit of a good automated system for move management is the ability to automate approvals for moves. This reduces the effort needed to obtain approvals and results in a clear record of actions.

It is useful to consider two types of approvals.

• **Business approvals** are typically done by the departments of individuals being moved and ensure compliance with company policies for space usage.

• **Facility approvals** are overseen by the facility department and ensure that assignments of space are consistent with overall facility planning and that move dates are feasible given the resources of the facility department. Where possible, approvals should be conditional so that they are only required in special cases. For example, a plan to move an employee into a space reserved for someone else might require special approval. In general, it is best to minimize the number of approvals needed to ensure that the move process is efficient and does not get delayed while waiting for unnecessary sign-offs.

Posting Moves

Once a move has been completed, the move administrator should post the move data in the move management or IWMS system. This process updates the space management data showing occupant space assignments. The posting process also records the key information of the move which is useful for analysis later.
Classifying Moves

It is useful to look at two general models of moves:

- **Individual Moves** – These make up the day to day work of many facility departments. They can be driven by new hires, promotions, departmental transfers, and employee departures.

- **Move Projects** – These are moves associated with a major facilities project. They can be driven by new real estate, corporate re-organizations, or building “re-stacks”. Typically, there is information associated with the move project such as key dates, budgets, and contacts.

Move Types

It is useful to track moves by some basic types to help with analysis. Typical move types might be:

- Box Move (A box move entails moving only personal contents and not furniture or equipment. It is the most economical type of move).
- Furniture Move
- Floor-to-Floor Move
- Building -to-Building Move

Tracking types of move allows for a better understanding of move costs and efforts. Organizations should work to reduce the number of moves entailing reconstruction and moving furniture and strive toward box moves.

Move Reason

It is also useful to track the reason for a move. Typically, the options would be:

- Department
- Facility
- Other

Moves requested by departments indicate changes driven by growth or changes within a department and is driven by the business. A move reason of “Facility” indicates a change driven by the company as a whole and may be related to acquiring new real estate. Some companies will charge departments where the move reason is “Department” but not when it is “Facility” or “Other”
The move management system will typically exist alongside other systems that manage aspects of an organization. This requires integration between systems to facilitate sharing of information. Some typical examples are as follows:

- **Human Resources** – These systems are the authoritative source for employees being hired, promoted, transferred or terminated within an organization. Since these actions will also entail facility tasks, an integration between the IWMS or move management system and the HR system is usually essential.

- **IT Systems** – These systems manage network access, email identities, and assignment of IT equipment such as laptop computers and smart phones.

- **Security Access Systems** – These systems manage building access for employees, so need information from facilities on employee location.

When integrating various enterprise data systems, it is useful to determine the "source of record" for key data elements. Typically, the Human Resources system is the source of record for the name, department and title of occupants. The space management system will be the source of record for current occupant locations. The move management system will be the source of record for future occupant locations.
Recommended Best Practices

1 | PROVIDE VISIBILITY INTO EXISTING AND PLANNED SPACE USAGE

Facility professionals must work with management to understand evolving business needs and goals before they can accurately plan for the spatial changes that will be required. Likewise, educating the management team on the spatial impacts of business decisions is crucial.

There are critical issues for which a facility manager must strategically plan. Will a new product require a new cross-functional team? Will that team of people require co-location? How will an upcoming acquisition or merger affect resources? Will employees be reorganized? Keeping abreast of management decisions and the drivers for change will help in planning the move event.

On a more tactical level, a good understanding of how space is currently occupied and used is critical for accurate planning.

2 | CREATE A TEAM OF MOVE LIAISONS TO MANAGE INTERDEPARTMENTAL COMMUNICATION

Facility managers should work with the departments they serve to identify a liaison within each department. By procedurally encouraging move requests to come through these individuals, significant time is saved, requested moves are within occupancy guidelines and liaisons are knowledgeable in providing the information needed for the move process.

3 | UNDERSTAND CHURN

Churn is necessary within any healthy, dynamic organization. The goal is not necessarily to reduce churn, but to understand it and minimize its cost and impact. Accurate and trustworthy move data is valuable in doing this analysis.

4 | AUTOMATE MOVE MANAGEMENT TASKS

Modern move management systems provide web-based forms for move requests and automatically manage the email communication to relevant parties. Information is electronically routed through the appropriate channels for review and approval beforehand, this reducing the bottlenecks later in the process. These communication improvements create accountability which results in minimal downtime during move and reduces overall costs.
Recommended Reports & Metrics

The following metrics and reports are useful in understanding the nature and impact of moves.

1. **Churn Rate** – This is a classic indication of the level of move activity within an organization. It is calculated by dividing the total moves over a year by the total personnel at the start of the year. Although there is not a clear industry definition on the formula, we would recommend counting the on-boarding of new employees and the off-boarding of departing employees as moves. The denominator is also not completely agreed upon but we would recommend using the headcount at the beginning of the year rather than the end and excluding employees who work remotely.

Example: A company with a non-remote headcount of 2,000 people does 1,200 moves in a given year. They will therefore have a church rate of 60% (1,200 / 2,000)

A high churn rate is not necessarily bad if the cause is company growth or change. However, a high churn rate may indicate a need to examine the reasons for moves to see if the churn rate might be reduced.

2. **Move Count** – This metric is calculated over a given time period. It is useful to compare move counts over time to understand trends and to analyze by department. Changes in move counts will generally correspond with changes in facility department expenses.

3. **Average Cost per Move** – This calculation is made by dividing total expenses related to moves by the number of moves over a given period of time, usually a year. The expense side may require some allocation of the facility management department’s salaries and administrative costs. The cost is an average and it is usually impractical to try to calculate exact costs for each move.

4. **Customer/Employee Satisfaction** – Since the move process is a major way that facility departments interact with their customers it is important to monitor customer satisfaction.

5. **Service Level Agreements** – A recommended practice is to monitor the response time between the date a move was requested and the date it was completed. This is particularly important if move services are outsourced with contract performance defined in service level agreement clauses.
Move Management & Agile Workspace

A significant trend in space management is the move toward unassigned workspace. Instead of assigning occupants to specific desks, offices or workstations people are encouraged to work where they feel they can be most effective. The terminology for this practice is not yet standardized but it is often described by terms such as agile workspace, flex space or activity based working.

Some organizations use “neighborhoods” that associate zones of a building with departments. This approach helps ensure that co-workers are near each other and provides a useful tool for management and planning.

The practice of move management changes with agile workspace, but it usually continues to be important for two reasons:

• Most organizations adopting agile workspace still have many employees in traditional, assigned workspace.
• Organizations using the neighborhood concept benefit with planning of occupant moves between zones.

Emerging Trends In Move Management

We see several other significant trends that are affecting the move management process.

• Ongoing reduction in physical items that are moved. As the workplace becomes paperless and employees become mobile, there are fewer files, books and physical items that need to be moved.
• Increased attention to ergonomics. The emphasis on workplace wellness drives attention to the workstation ergonomics including adjustable height worksurfaces, ergonomic chairs and special lighting.
• Increase in related enterprise systems. Move management systems need to integrate with other enterprise systems to take full advantage of collaboration.
Conclusion

As the rate of change within business continues to accelerate, it is essential that facility departments have modern systems in place to manage employee and department relocation efficiently. A good move management system will facilitate streamlined processes resulting in satisfied customers and providing useful metrics to support process improvement.
About the Author

Michael Schley is the Chairman and Founder of FM:Systems. He founded FM:Systems in 1984 with the vision of creating a flexible, comprehensive facility management system that could be easily used by facility planners and managers. He chairs FM:Systems’ Board of Directors and is engaged in guiding company strategy and product direction.

Mr. Schley is recognized globally for his expertise in facility management technology and has spoken at numerous conferences throughout the world. He organized the first Workplace Strategy Summit conference held at Cornell University in 2012. He was recognized by the International Facility Management Association as an IFMA Fellow and served as Chair of the IFMA Foundation.

About FM:Systems

Founded in 1984 to help facilities teams effectively manage even the most demanding building portfolios, FM:Systems created FM:Interact, a cloud-based Integrated Workplace Management System (IWMS) that can help to improve the management of space, occupancy, assets, moves, maintenance, leases and property.

FM:Systems’ promise is to provide their clients with quick and easy access to key facility information such as floor plans, reports, employee information and critical documents which can enable facilities teams to securely share information and manage facility processes more effectively that impact the entire organization.

For further information, visit fmsystems.com