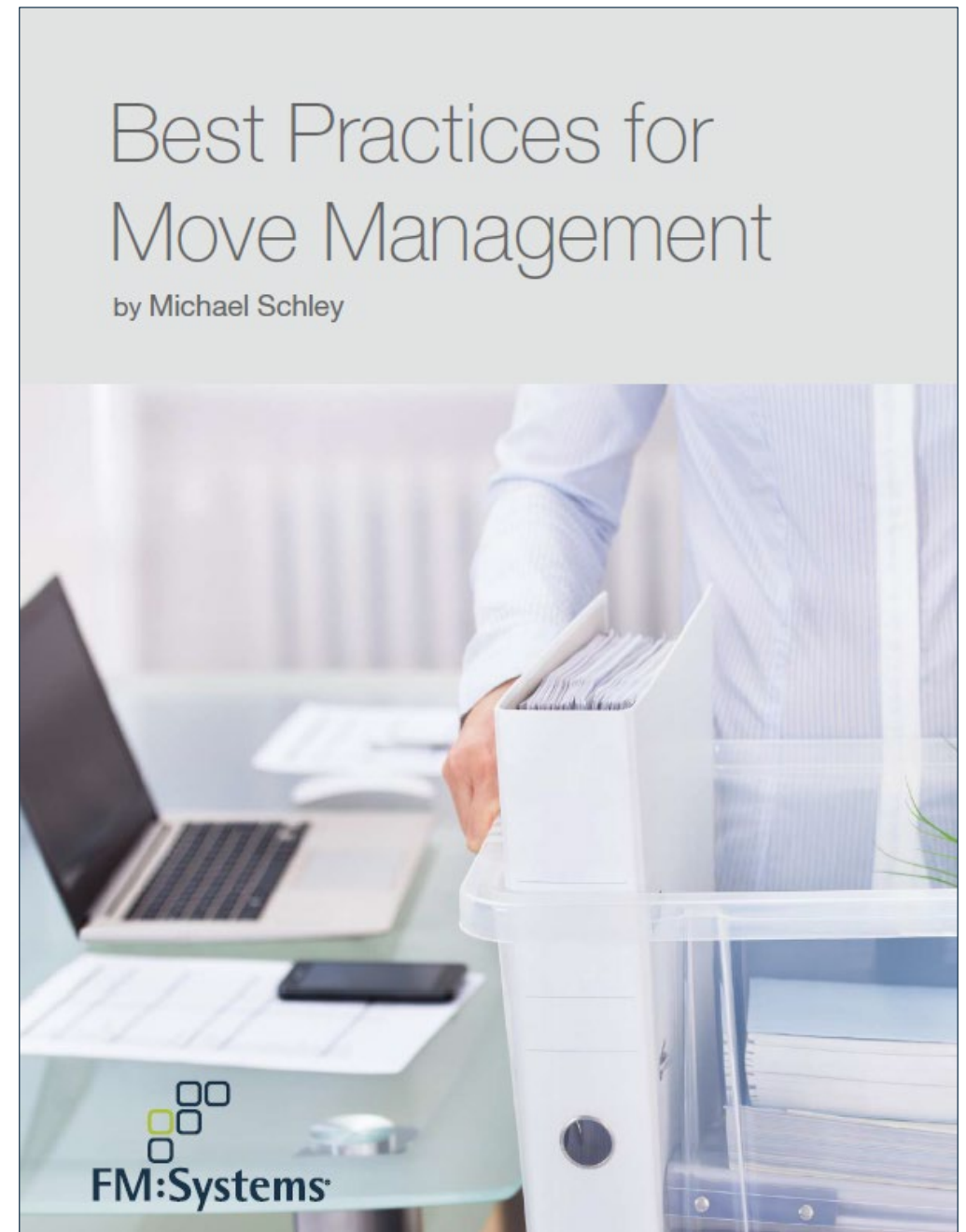
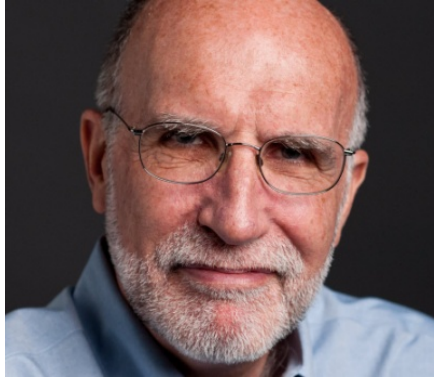


Best Practices for Move Management

Michael Schley, IFMA Fellow
Founder and Chairman, FM:Systems

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About Michael Schley

- Began career as registered architect.
- Founded FM:Systems in 1984
- Retired from CEO role in 2017.
- Currently Chairman of the FM:Systems Board of Directors



Industry Activities

- Named IFMA Fellow in 2008
- Chaired the AIA CAD Layer Guideline Task Force
- Served as Chair of the IFMA Foundation Board of Trustees
- Serve on FM Advisory Councils for Georgia Tech and Cornell University

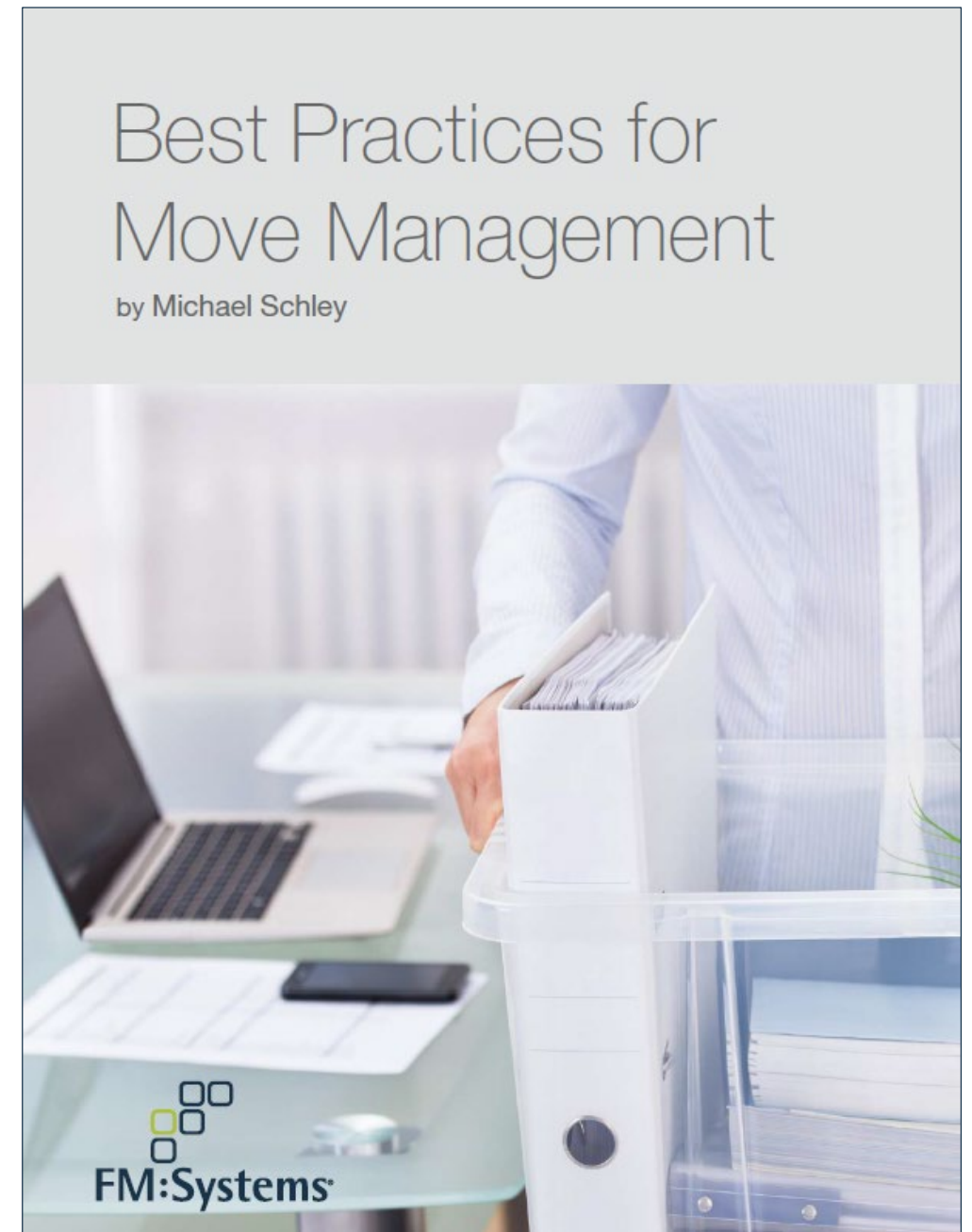
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Why a Best Practice?

1. Formalize what we know.
2. Help new customers get a fast and solid start.
3. Support continuous improvement.
4. Provide a guide on emerging trends.

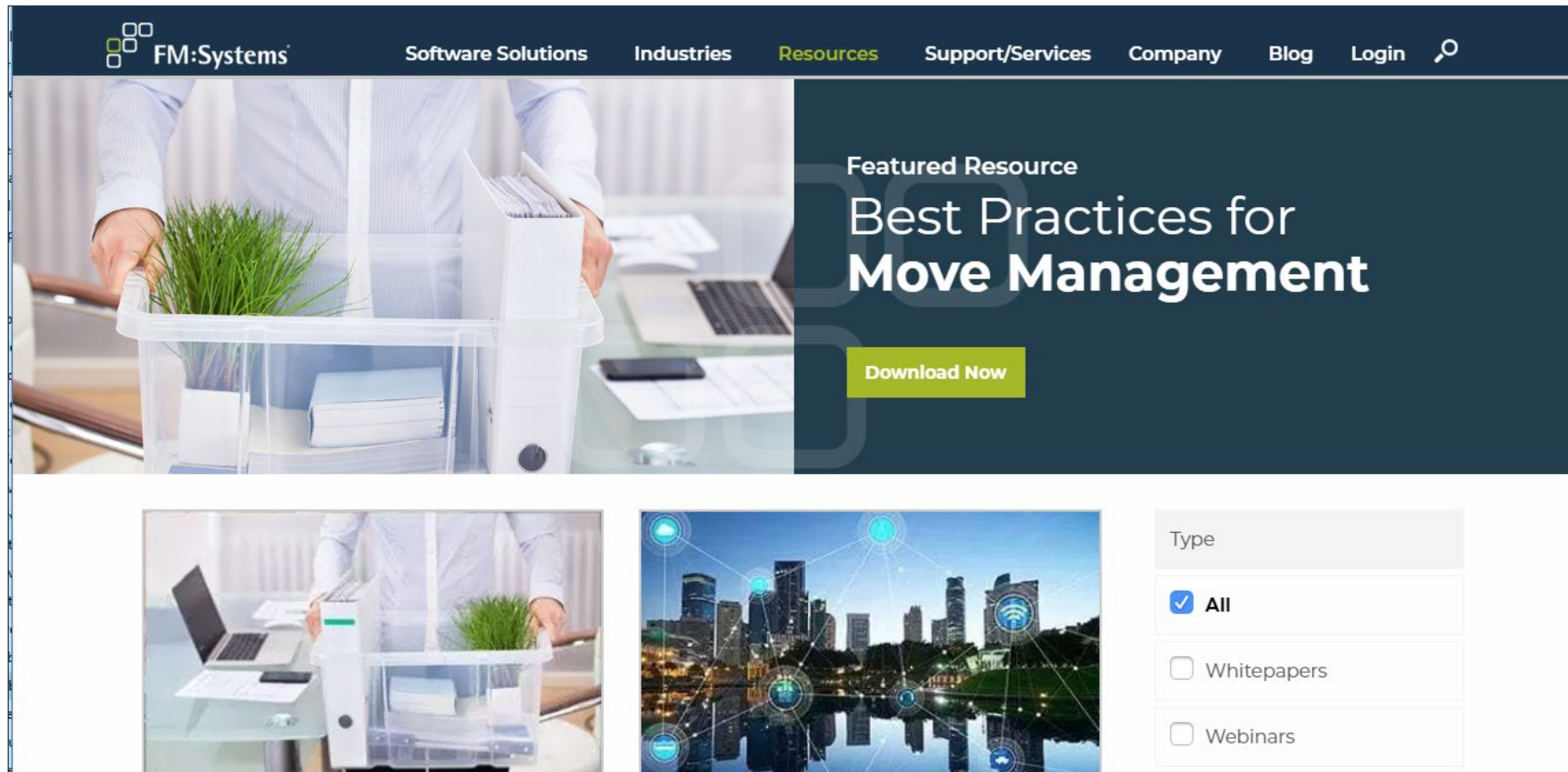
What the whitepaper is not:

1. It is not a how-to guide.
2. It is not an advertisement.
3. It is not intended to cover all situations.



How do I get the document?

1. Go to www.fmsystems.com
2. Click on Resources tab.



Why is a good move process important?

- Organizations are in a constant state of change, moving half of all employees every year on average.
- Major draw on FM department resources.
- Disruptive to employees being moved
- Because doing moves the traditional way is madness



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.

Traditional Semi-Automated Move Process

- Communication through email
- Tracking through spreadsheets
- FM needs to do everything
- Many meetings
- No good way to reschedule a move
- Approvals for exceptions are done by email and often result in delays
- Too many errors



Modern Automated Move Process

- Communication driven by the move system
- Tracking through a shared database
- Departments share in the process
- Only occasional meetings
- Changes are done smoothly and efficiently
- Approvals are done through the move system and are efficiently processed
- Errors are rare



Benefits of a Good Move Management Process

- Efficiency
- Minimized Disruption
- Collaboration



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.

Framework for Understanding Move Management

- Requests
- Planning
- Coordination
- Analysis

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.



Move Management Terms

- MAC (Move, Add, Change)
- Restack
- Swing Space
- On-board
- Off-board
- Scenario Planning (“Test fit”)
- Churn
- Move Project

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.



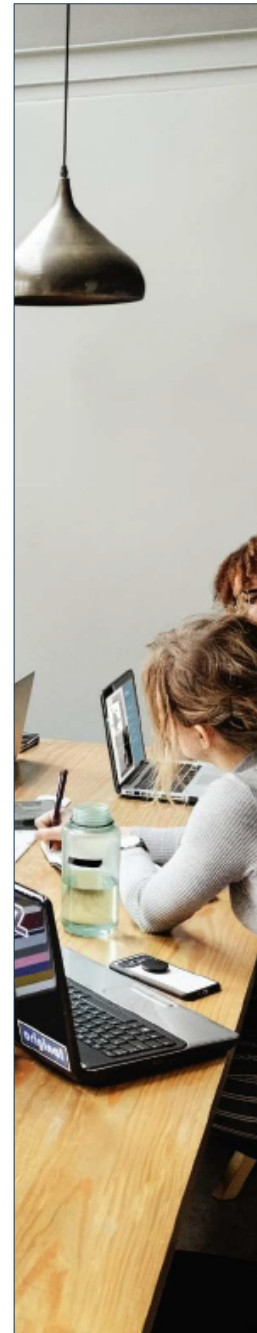
Move Workflow

- Roles
- Tasks and Activities
- Automated Rules/ Exceptions
- Schedules
- Sequencing and Dependencies
- Communication



Roles

- Move Planner
- Move Technician
- Move Liaison or Coordinator
- Move Approver
- Move User



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 Approver** - Individuals whose jobs entail approval of proposed moves.
- **Move User** - The individual being moved.

Supporting Services

- IT/ Telecom
- Security
- Furniture
- Mail Room
- Human Resources



Tasks & Activities

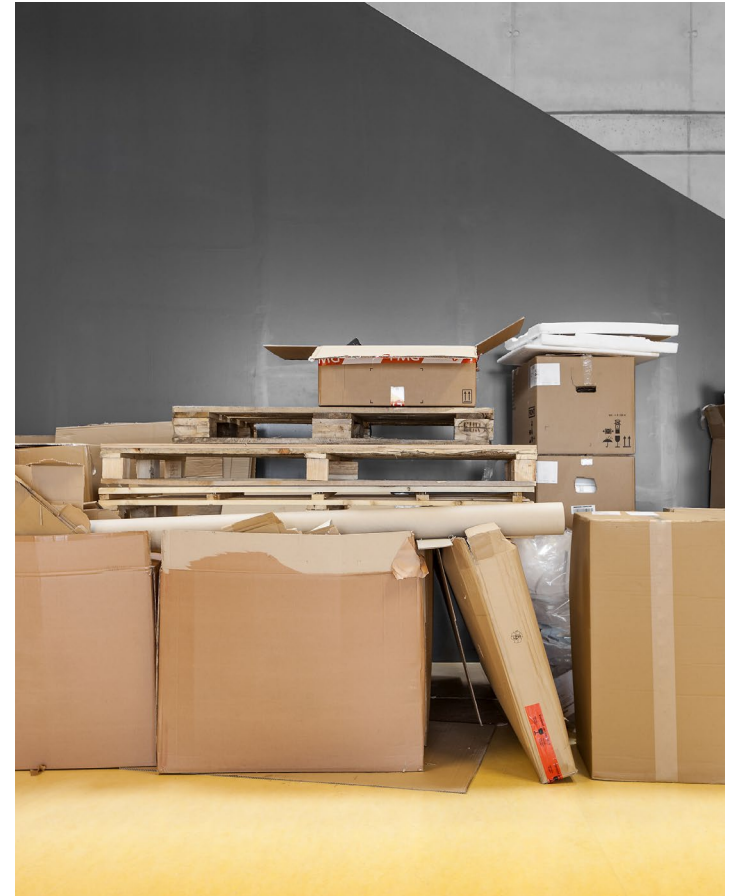
Move projects can entail numerous activities, some performed by the facilities department and some performed by others. A list of activities that may be part of the move process is as follows:

- 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

Automated Rules and Method of Making Exceptions

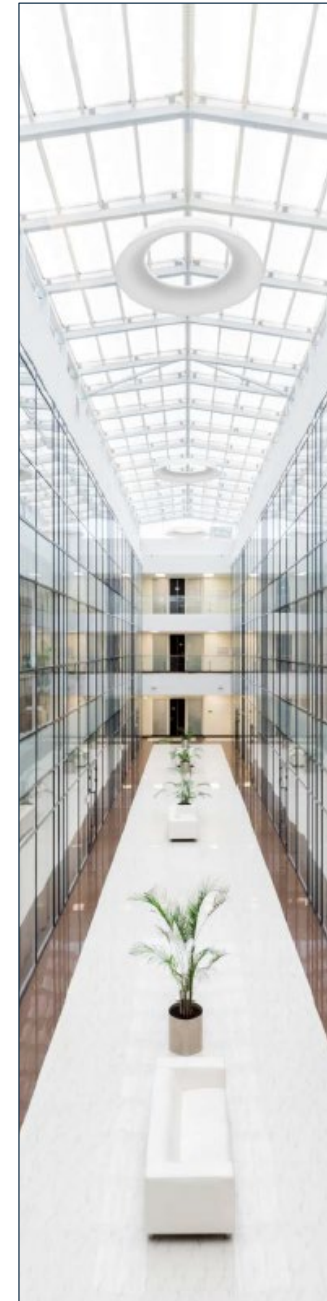
Examples

- The workspace type must be appropriate for the person being moved. (No you can't have that nice corner office, even if it looks vacant)
- You can't move a person from one department into another department's space without approval.
- The FM department can do major moves only on weekends and needs four weeks of notice.



Collaboration

- Move Liaisons
- Engage supporting departments
 - IT
 - Telecom
 - Furniture Vendor
 - Security (Access)
- Communication
 - Change updates
 - Completion status updates
 - Requests for action



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.

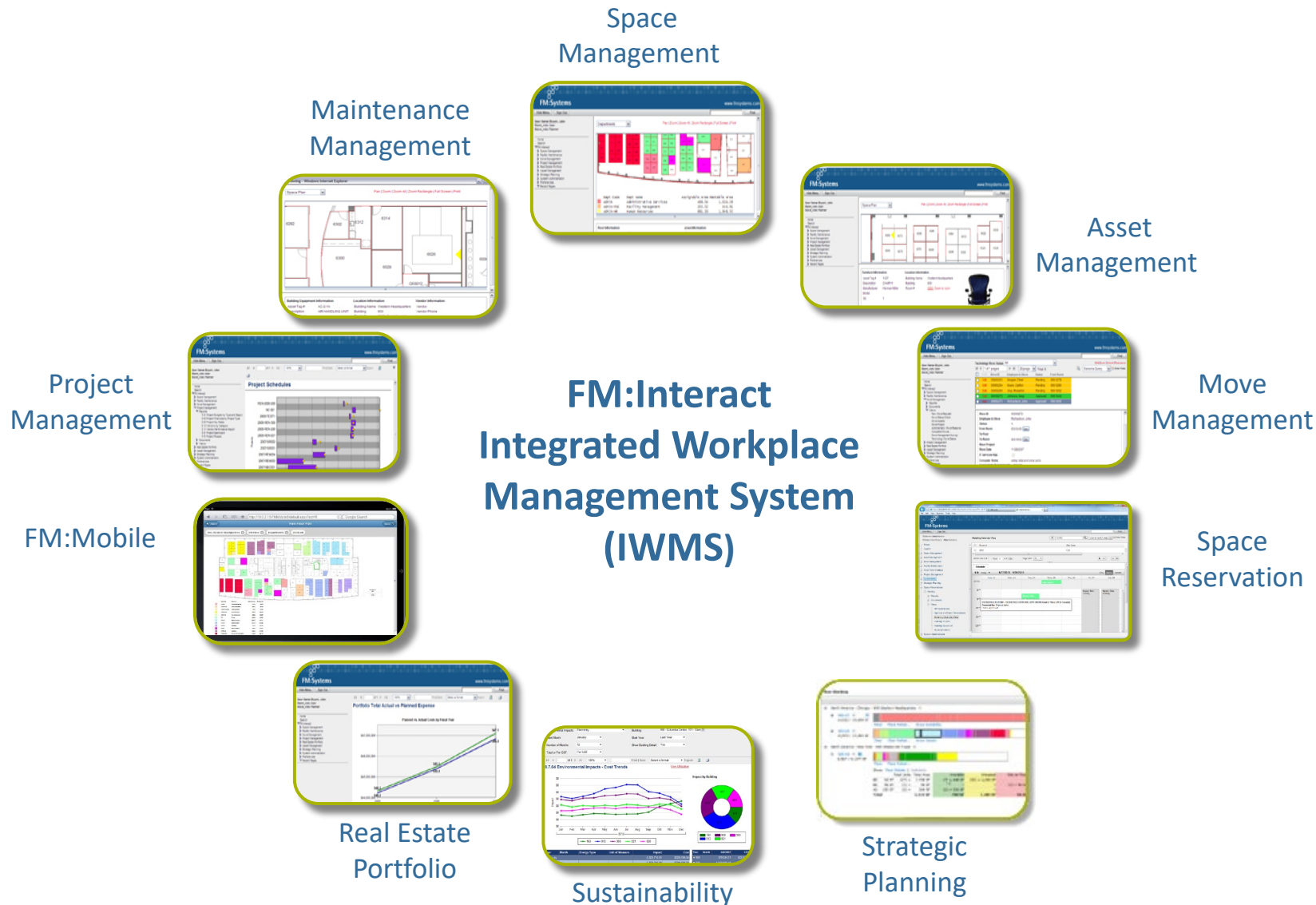
Move planning is enhanced with visual planning tools that show occupancy before and after a move and support "drag and drop" move planning. Departmental liaisons can be more effective in their decision-making if they are provided with visual floor plans.

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.

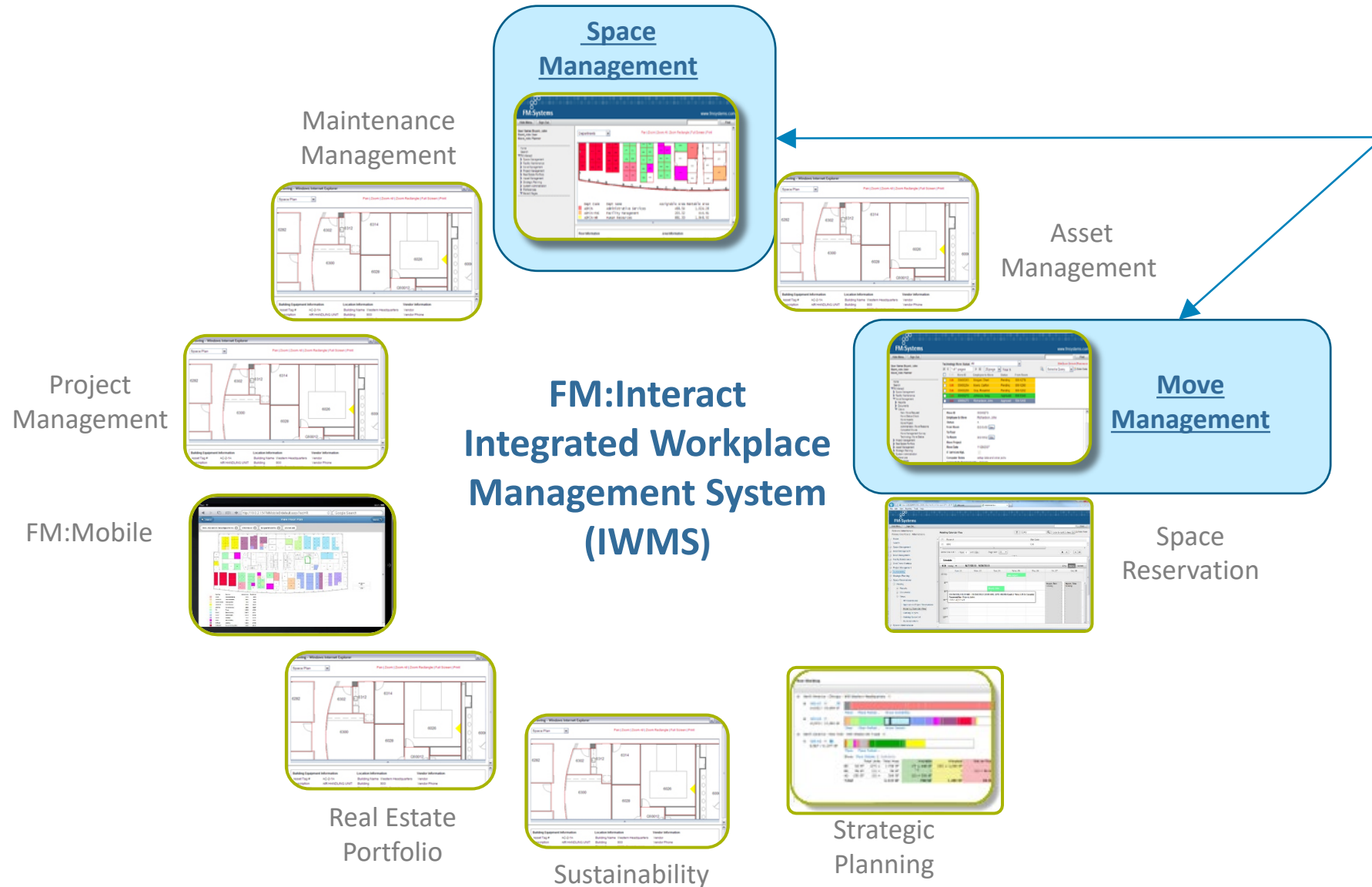
Benefits of Move Management within an Integrated Workplace Management (IWMS) System



General Benefits

- Single system to manage
- Common user interface
- Shared identity management
- Efficiency of shared data

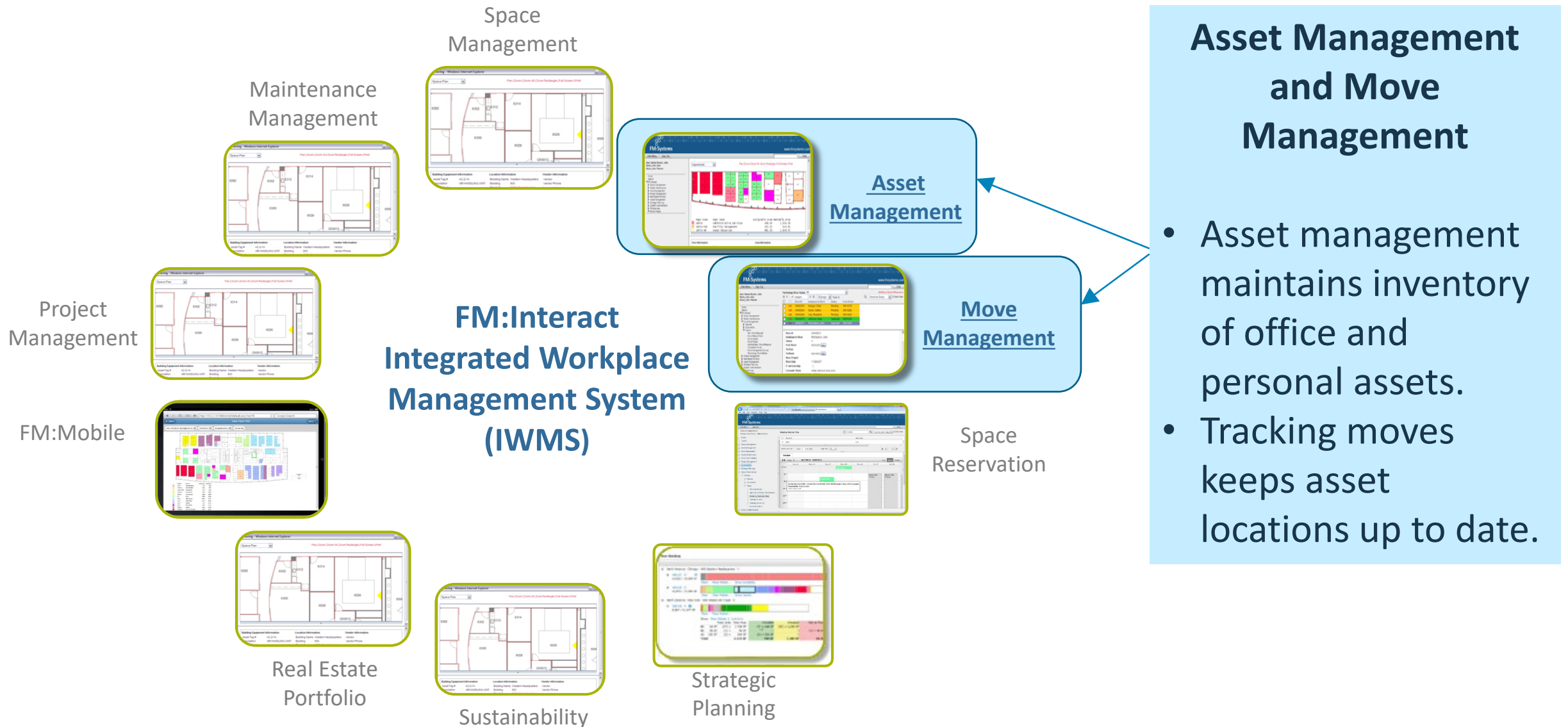
Benefits of Move Management within an Integrated Workplace Management (IWMS) System



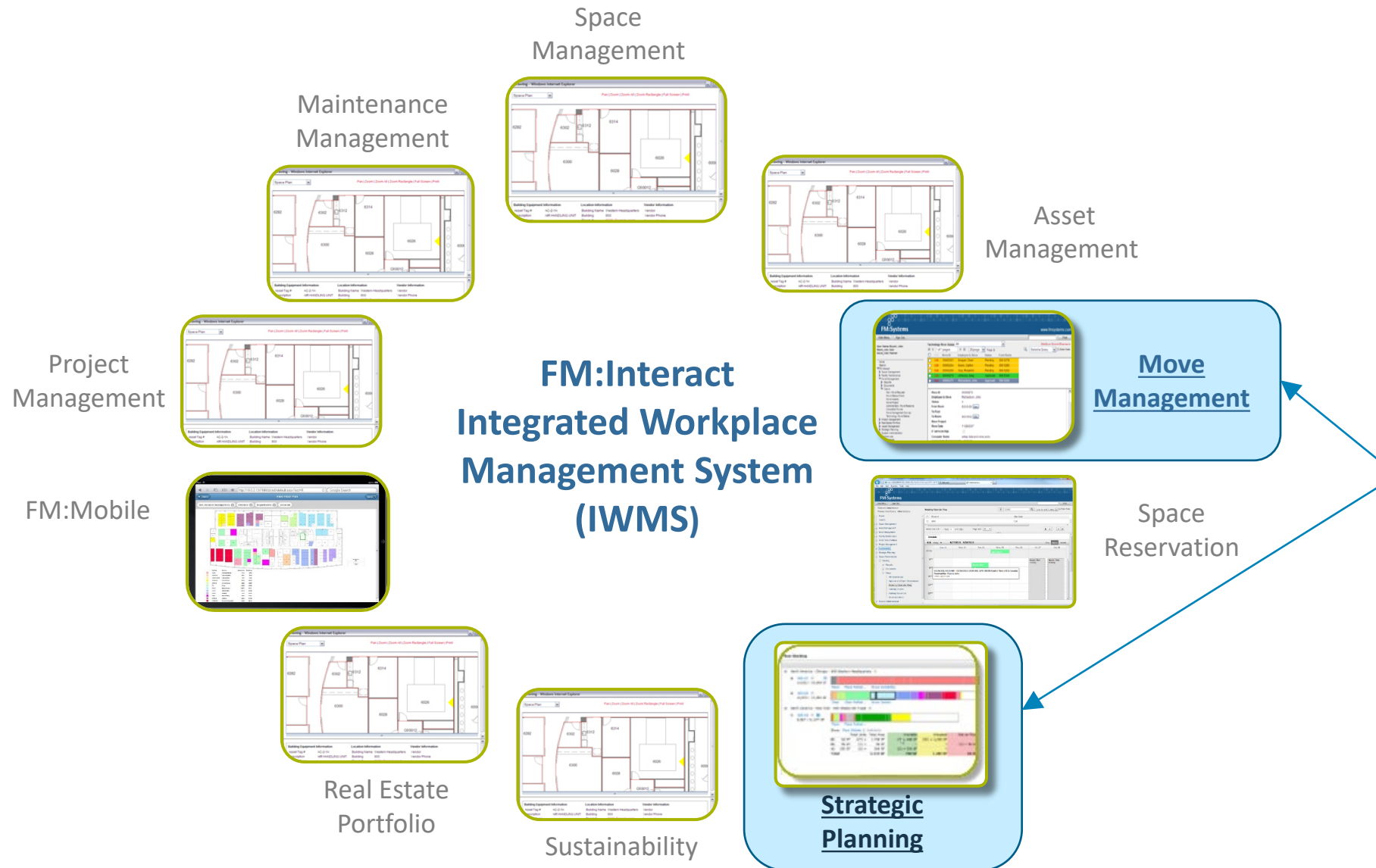
Space Management and Move Management

- Space Management data provides the starting point for planned moves.
- Tracking moves keeps space management up to date.

Benefits of Move Management within an Integrated Workplace Management (IWMS) System



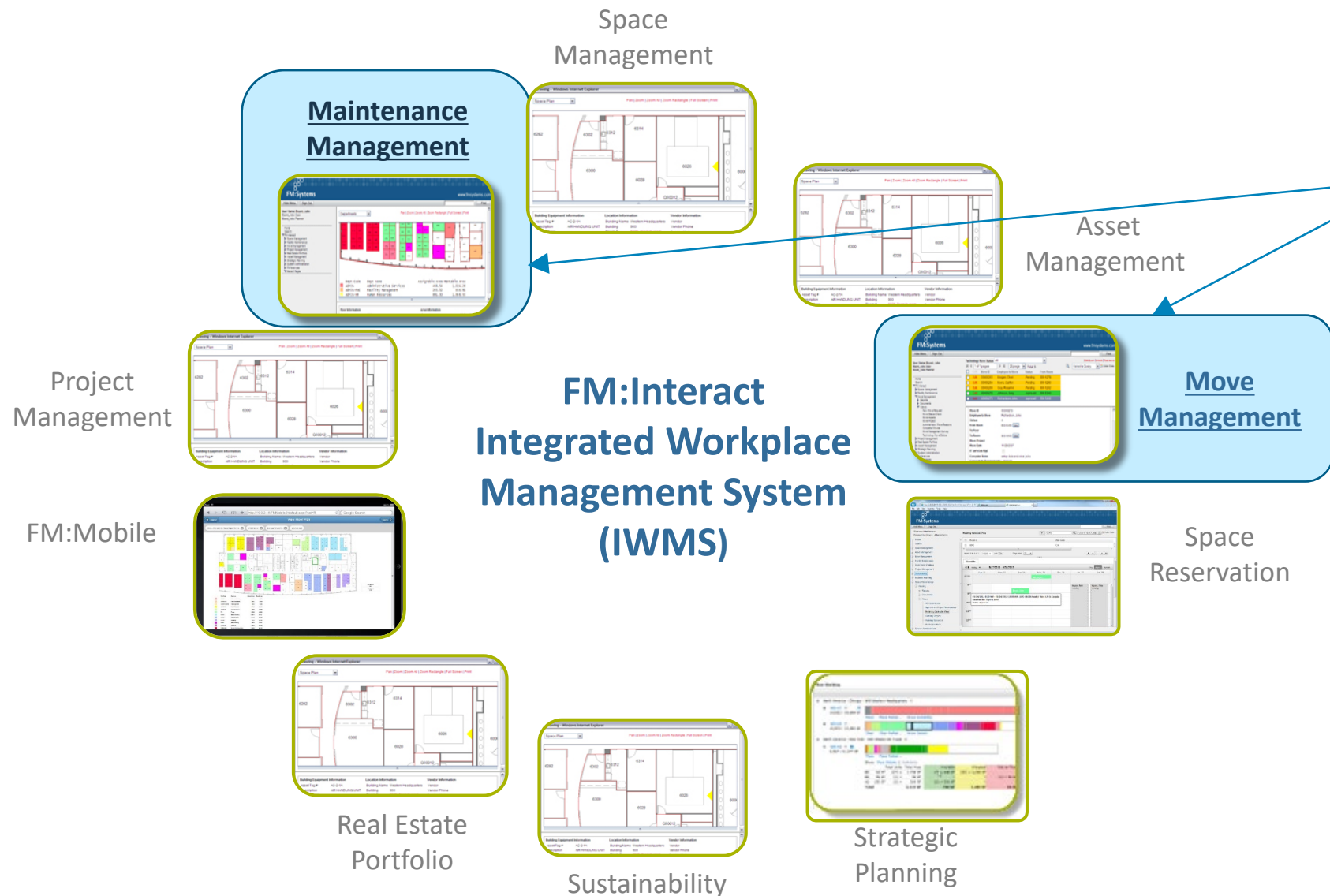
Benefits of Move Management within an Integrated Workplace Management (IWMS) System



Strategic Planning and Move Management

- Strategic planning provides guidance on long-term planning, company growth, and macro-level real-estate options.
- Planning scenarios can be turned into move projects.

Benefits of Move Management within an Integrated Workplace Management (IWMS) System



Move Management and Maintenance Management

- Work requests can be associated with planned moves for better coordination.

Classifying Moves

Move Types- Useful for understanding and reducing move costs.

- Box Move
- Furniture Move
- Floor-to-floor move
- Building-to-building move

Move Reasons – Useful for understanding and reducing churn.

- Department
- Facility
- Other

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"

Approvals

- **Business Approvals** – by department managers to ensure moves within company policy
- **Facility Approvals** – by facility manager to ensure moves are feasible within departmental resources and assignments don't conflict with other plans.
- Advice – Keep approvals to a minimum.

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.

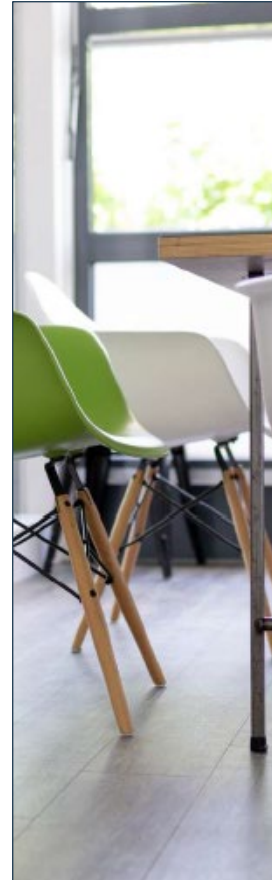
Posting Moves

Once a move has been completed, the move administrator should post the move data in the move management or IMMS 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.



Integration with Other Enterprise Data Systems

- Human Resources – Providing location information
- IT Systems – Network access, provisioning of personal IT assets such as laptops and smart phones.
- Security Access Systems – Badge access.



Integration With Other Enterprise Data Systems

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.

Best Practices

1. Provide visibility into space usage.

Best Practices

1. Provide visibility into space usage.



Dept Code	Dept Name	Assignable Area
10000	CEO & President	1,501
10140	Svc Business Devl	1,180
10145	Service Development	324
10161	Quote/Renew	113
10313	CSM Northern HQ	243
10322	Corp Real Estate	2,491
10771	USC Data Ctr Svcs	1,395
10845	Sales Support	81
10921	Electronics Engineering	81
10989	Ops and Maint	112
Unassigned	No organization allocation	1,087
Total		8,608

C Chritz 1-220E Workstation
1-220D Workstation
K Davis 1-220C Workstation
1-220B Workstation
C Scott 1-220A Workstation

□ C7

1-222E Workstation	D Adkins 1-224E Workstation
1-222D Workstation	1-224D Workstation
1-222C Workstation	1-224C Workstation
E Peeples 1-222B Workstation	B Alonzo 1-224B Workstation
1-222A Workstation	1-224A Workstation

1-226E Workstation	1-228E Workstation
1-226D Workstation	1-228D Workstation
1-226C Workstation	1-228C Workstation
1-226B Workstation	1-228B Workstation
1-226A Workstation	1-228A Workstation

C9 □

1-230F Workstation (Hotel)	1-232F Workstation (Hotel)
1-230E Workstation (Hotel)	1-232E Workstation (Hotel)
1-230D Workstation (Hotel)	1-232D Workstation (Hotel)
1-230C Workstation (Hotel)	1-232C Workstation (Hotel)
1-230B Workstation	D Morris 1-232B

B11

C10

C Chritz 1-220E
1-220D
K Davis 1-220C M Grady 6/28/2017
1-220B
C Scott 1-220A

C7

1-222E H Johnson 5/17/2017	D Adkins 1-224E
1-222D L Christi 5/29/2017	1-224D V Diaz 5/20/17 Graziano 5/15/2017
1-222C D Gamble 6/28/2017	1-224C C Scott 5/29/2017
E Peebles 1-222B	B Alonzo 1-224B
1-222A S Davis 6/20/2017	1-224A C Willis 5/17/2017

1-226E	1-228E
1-226D	1-228D
1-226C	1-228C
1-226B W Lester 6/19/2017	1-228B C9
1-226A A Gray 5/15/2017	1-228A P Holm 5/17/2017

1-230F	1-232F
1-230E	1-232E
1-230D	1-232D
1-230C	1-232C
1-230B	D Morris 1-232B

B11

C10

Best Practices

1. Provide visibility into space usage.
2. Create an interdepartmental team.



Best Practices

1. Provide visibility into space usage.
2. Create an interdepartmental team.
3. Understand and reduce the cost of churn.



Best Practices

1. Provide visibility into space usage.
2. Create an interdepartmental team.
3. Understand and reduce the cost of churn.
4. Automate tasks.



Recommended Reports and Metrics

1. Churn Rate
2. Move Count
3. Average Cost per Move
4. Employee Satisfaction
5. Service Level Agreements

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 churn 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.



Emerging Trends

- Agile Workspace
 - Yes, move management is still relevant.
 - Neighborhood Concept



Emerging Trends

- Agile Workspace
- Reduction in physical items that are moved.



Emerging Trends

- Agile Workspace
- Reduction in physical items that are moved.
- Ergonomics
 - Sit-stand worksurfaces
 - Special ergonomic chairs
 - Special lighting



Emerging Trends

- Agile Workspace
- Reduction in physical items that are moved.
- Ergonomics
- **Integration with other corporate data systems**
 - HR
 - IT



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.

Questions?

Best Practices for Move Management

by Michael Schley



Thank You

Best Practices for Move Management

by Michael Schley



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