

FROM PLAN TO PLACE

AN OFFICE MOVE CHECKLIST



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YOUR GUIDE TO A SUCCESSFUL MOVE

Moving to a new office represents more than a change of address—it's an opportunity to reshape how your organization works, collaborates, and grows.

At Interplan, we understand that a successful move begins long before construction starts. From defining your goals and space requirements to coordinating vendors and planning the final transition, each step builds the foundation for a smooth relocation and a workplace that truly supports your team.

Use this booklet as a working tool to keep your team organized and confident throughout the process. Check off tasks as you go, involve key members of your organization, and rely on your design team to ensure every detail is coordinated.

Your new space begins here — let's get moving.



PLANNING YOUR MOVE

Selecting the right location is one of the most important steps in any move. It sets the foundation for how your team will work, connect, and grow in the years ahead. The process begins with understanding your current space—what works, what doesn't, and what your ideal environment looks like. From there, you can assess options through the lens of functionality, accessibility, and long-term goals.



UNDERSTAND YOUR NEEDS

- ☐ Assemble an in-house planning team from departments such as HR, Finance, IT, and Operations to provide input on priorities, workflows, and requirements.
- ☐ Discuss with your team what's working well in your current space—and what could improve.
- ☐ Identify operational needs: how does your layout support or limit daily workflows?
- ☐ Conduct a storage audit to assess current filing, supply, and equipment storage—and plan for how these needs may evolve.
- ☐ Consider hybrid or remote work schedules and how they should influence the new space.
- ☐ Forecast future growth to plan for staffing and equipment needs over time.

DEVELOP YOUR PROGRAM

- ☐ Translate your operational needs into a program that defines the types and quantities of spaces required.
- ☐ Identify your must-have spaces and categorize them by use.

DEFINE YOUR REQUIREMENTS

- ☐ Work with your design team to estimate the square footage needed to support your team and operations.
- ☐ Establish your priorities for location, budget, and lease length.
- ☐ Determine your must-haves vs. nice-to-haves to guide the site selection process.



Want to learn more about this stage in the process?
Check out our post: [Choosing A Location](#).

EVALUATING BUILDING OPTIONS

With your program and goals established, the next step is to identify and evaluate potential buildings that meet your criteria. The inventory of available real estate can be vast, so it's helpful to approach this phase with clear parameters and trusted partners. Working with experienced brokers allows you to focus on what matters most—how each space supports your brand, team, and long-term vision.

ENVISION THE EXPERIENCE

- ☐ Determine whether you want a custom design and buildout to express your brand identity or a space ready for occupancy.
- ☐ Consider where your client target is located, and proximity to them.
- ☐ Identify which amenities are most important to your team, such as parking, fitness facilities, on-site dining, nearby retail, and public transportation.
- ☐ Consider location factors that impact daily life, including accessibility, commute times, and surrounding neighborhood character.
- ☐ Evaluate first impressions: building presence, lobby experience, and ease of navigation for visitors and staff.
- ☐ Review building infrastructure elements like core layout, structural bays, window lines, and system quality.



PARTNER WITH YOUR BROKER

- ☐ Provide brokers with your defined selection criteria, including desired location, amenities, and financial parameters.
- ☐ Review initial building presentations and comparison materials to narrow your list of options.
- ☐ Tour shortlisted properties in person to assess experience, accessibility, and fit.
- ☐ Gather feedback from team members and consolidate impressions after each visit.

ANALYZE AND COMPARE

- ☐ Work with your broker to compile comparative spreadsheets including:
 - Square footage and layout flexibility
 - Lobby exposure and visibility
 - Parking and transit access
 - Building and neighborhood amenities
 - Rental rates, ownership details, and asset information (as available)
 - Tenant Improvement Allowance (TIA), proposed lease terms, and other negotiable factors

HELPFUL TIPS

1

Create a wish list with your top five wants and needs

2

Envision the next phase of your organization as you evaluate spaces

3

Use your new space as an opportunity to rebrand

4

Bring your architecture firm in as early as possible



Want to learn more about this stage in the process? Check out our post: [Building Parameters](#).

TEST FITS

Once potential buildings have been identified, the next step is to explore how well each can support your operational and spatial needs. The test fit process transforms planning into visualization—turning your program into real layouts that reveal each building’s potential and limitations. By comparing test fits side by side, you can evaluate which configuration best aligns with your functional goals, budget, and brand.



DEVELOPING TEST FITS

- ☐ Work with your design team to review test fit layouts for each shortlisted building and evaluate how your program translates into real floor plans. Evaluate:
 - Size and function of spaces within the suite
 - Circulation and flow
 - Public vs. private zones
 - Adjacencies between departments and activities
 - Access to natural light and shared amenities
 - Column spacing, window placement, and core configuration affecting efficiency
 - How each layout supports workflow, collaboration, and client experience
- ☐ Work with your design team to refine layouts through multiple iterations to optimize efficiency, client experience, and flexibility.

COORDINATE WITH BROKERS AND LANDLORDS

- ☐ Work with your design team and broker to ensure each test fit aligns with lease parameters and buildout potential.
- ☐ Discuss landlord feedback with your design team to confirm the feasibility of preferred layouts.
- ☐ Use these studies to support informed decision-making and confident lease negotiations.

FINALIZE DIRECTION

- ☐ Confirm the building and layout that best supports your program, budget, and culture.
- ☐ Finalize the test fit as the foundation for design development and project planning.



Want to learn more about this stage in the process?
Check out our post: [Test Fitting Interplan](#).

DESIGN INTENT & BUDGET PLANNING

After selecting a building, the focus shifts from possibilities to plans. The design team develops Design Intent Plans that define how concepts from the test fits will take shape in the new space. These plans allow contractors to prepare budget estimates and help determine how the Tenant Improvement Allowance (TIA) will be best used.

FINALIZE DESIGN INTENT PLANS

- ☐ Work with your design team to refine the approved test fit layouts into Design Intent Plans.
- ☐ Review how the plans define organization, construction, and finishes for each area.
- ☐ Confirm that design priorities and functionality are accurately represented.
- ☐ Ensure plans include enough detail for contractors to prepare preliminary budget.



REVIEW TENANT IMPROVEMENT ALLOWANCE (TIA)

- ☐ Confirm the total TIA amount as outlined in the lease agreement.
- ☐ Discuss with your design team how to best allocate funds for greatest impact.
- ☐ Identify any existing building conditions that may affect cost.
- ☐ Prioritize areas such as:
 - Entry and reception finishes
 - Staff gathering or amenity areas
 - Technology or infrastructure upgrades

REQUEST AND REVIEW BUDGET ESTIMATES

- ☐ Have your design team distribute Design Intent Plans to selected General Contractors.
- ☐ Review preliminary budget estimates for alignment with project goals.
- ☐ Compare pricing and provide feedback on scope and finishes.
- ☐ Work with your design team to refine plans or scope as needed to meet target budgets.

ALIGN DESIGN AND BUDGET

- ☐ Consider cost-saving strategies or material substitutions recommended by your design team.
- ☐ Confirm final direction for materials, finishes, and features.



Want to learn more about this stage in the process?
Check out our post: [Using Your Tenant Improvement Allowance Dollars to Your Best Advantage.](#)

SELECTING YOUR DESIGN TEAM

With test fits complete and lease negotiations nearly finalized, the next step is assembling the right team to bring your new space to life. Every project requires an architect or interior designer to prepare drawings, obtain permits, and oversee construction. Whether you continue working with the team who prepared your test fits or select a new firm, it's important to choose a partner who understands your business, communicates clearly, and aligns with your goals.

GATHER RECOMMENDATIONS

- ☐ Ask colleagues, brokers, or partners for referrals to design firms they've worked with successfully.
- ☐ Speak directly with past clients to learn about their experiences and satisfaction with the firm's work.
- ☐ Ask specific questions such as:
 - Did the design team listen and incorporate feedback?
 - Was the project delivered on time and within budget?
 - Would they choose to work with the firm again?

EVALUATE FIT AND APPROACH

- ☐ Review how each firm structures their team and manages projects.
- ☐ Confirm who will be involved throughout the process—from initial design through construction.
- ☐ Determine whether senior staff remain actively engaged from start to finish.
- ☐ Look for a balance between capability and personalized attention.



REVIEW RELEVANT EXPERIENCE

- ☐ Review the firm's portfolio for projects similar in size, scope, and industry. Also, look for examples that demonstrate both creativity and technical precision.
- ☐ Confirm that the design team understands your market sector and operational needs.
- ☐ Ask how they coordinate with contractors, consultants, and end users.

ASSESS COMMUNICATION AND COMPATIBILITY

- ☐ Pay attention to how quickly and professionally they respond to initial inquiries.
- ☐ Confirm that the team listens carefully and shows genuine interest in your project.
- ☐ Observe whether their communication style aligns with how your team prefers to work.
- ☐ Assess whether they make you feel valued, respected, and understood.

VERIFY RELIABILITY

- ☐ Ask how the firm handles challenges or unexpected issues during construction.
- ☐ Confirm that they maintain collaborative relationships with general contractors.

ALIGN VALUES AND VISION

- ☐ Discuss what drives the firm's design philosophy—creativity, sustainability, innovation, or collaboration.
- ☐ Determine whether their approach aligns with your organization's goals and culture.
- ☐ Select a design team that shares your passion for creating environments that inspire and support success.



Want to learn more about this stage in the process?
Check out our post: [Selecting An Architect](#).

SELECTING A GENERAL CONTRACTOR

With your lease finalized and design team in place, the next step is selecting a General Contractor (GC) to bring your new space to life. Your design team will guide you through the bidding and selection process, helping you evaluate qualified firms, compare proposals, and make an informed decision based on scope, quality, and budget alignment.

IDENTIFY POTENTIAL GENERAL CONTRACTORS

- ☐ Work with your design team to develop a list of 3-4 qualified GCs to invite to bid.
- ☐ Ask colleagues or industry peers for referrals based on their own build-out experiences.
- ☐ Contact landlords or brokers for recommendations on GCs familiar with your building.
- ☐ Ask referral sources key questions, such as:
 - Was the project completed on time and within budget?
 - How was communication and responsiveness during construction?
 - Did the quality of workmanship meet expectations?

EVALUATE QUALIFICATIONS

- ☐ Review each GC’s relevant experience with similar project types and sizes.
- ☐ Ask about the firm’s unique capabilities, specialties, or certifications.
- ☐ Review references from clients with projects comparable to yours.
- ☐ Consider GCs who have previously worked with your landlord or design team to streamline coordination.

PREPARE THE BID PACKAGE

- ☐ Work with your design team to finalize and distribute the bid package, including construction drawings, specifications, and bid instructions.
- ☐ Confirm that all bidders receive the same materials, deadlines, and submission requirements.
- ☐ Attend a pre-bid walkthrough (if scheduled) with your design team and invited GCs to review existing site conditions and clarify questions before bids are due.

REVIEW AND COMPARE BIDS

- ☐ Review all bids with your design team once received.
- ☐ Use side-by-side comparisons to ensure an “apples-to-apples” evaluation across pricing and scope.
- ☐ Discuss notable differences in pricing or assumptions made by each GC.
- ☐ Review how each proposal addresses key construction divisions, such as millwork, finishes, and MEP systems.
- ☐ Evaluate each firm’s proposed schedule, staffing, and approach to project phasing.

CONDUCT INTERVIEWS, IF NEEDED

- ☐ Schedule interviews with shortlisted GCs to discuss their approach, team structure, and communication style.
- ☐ Ask how they collaborate with architects and consultants during construction.
- ☐ Confirm their understanding of project priorities and expectations.

SELECT AND CONFIRM THE GC

- ☐ Review the final analysis and recommendations from your design team.
- ☐ Confirm which GC best aligns with your project’s budget, schedule, and quality goals.
- ☐ Ensure the selected team demonstrates strong communication and collaborative capabilities.
- ☐ Engage the GC formally to begin construction planning and permitting.



Want to learn more about this stage in the process?
Check out our post: [Selecting A General Contractor](#).

IDENTIFYING AND SELECTING ANCILLARY VENDORS

Designing a new office goes beyond walls and finishes—it requires planning for the systems, furnishings, and services that make your space fully functional. Many of these scopes fall outside the General Contractor’s responsibilities and require separate contracts with specialized vendors. Early coordination between your team, design team, and vendors ensures that technology, furniture, and other operational elements integrate seamlessly into your new space.

INFORMATION TECHNOLOGY (I.T.)

- ☐ Engage an I.T. vendor early to plan network and equipment relocation or upgrades.
- ☐ Determine what systems will be reused versus replaced in the new space.
- ☐ Confirm that patch cabling, wireless access points (WAPs), and server equipment are properly specified.
- ☐ Coordinate with your design team and movers to ensure specialized I.T. equipment is handled safely.



DATA CABLING

- ☐ Select a low-voltage cabling vendor to install network cabling throughout the space.
- ☐ Review data drop locations on your design drawings to confirm they meet operational needs.
- ☐ Coordinate with your furniture plan to ensure all workstation and conference room connections are accessible.
- ☐ Verify that cabling is tested and certified before move-in.

AUDIO/VISUAL SYSTEMS

- ☐ Identify an A/V vendor or consultant to design and install your sound and video systems.
- ☐ Define needs for conference rooms, meeting areas, and collaborative spaces.
- ☐ Review drawings showing locations for TVs, speakers, cameras, and connectivity points.
- ☐ Confirm integration with data cabling and I.T. systems for a seamless setup.

SECURITY SYSTEMS

- ☐ Engage a security vendor to design access control, surveillance, and alarm systems.
- ☐ Coordinate with building management to integrate with base building systems.
- ☐ Determine entry/exit points, credential types, and access levels for staff.
- ☐ Confirm all power and cabling needs are shown in construction drawings.

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FURNITURE

- ☐ Decide whether to reuse existing furniture, purchase new, or create a blended solution.
- ☐ Conduct a furniture inventory with your design team or vendor to assess condition and quantity.
- ☐ Review furniture layouts to ensure alignment with power and data locations.
- ☐ Coordinate with your furniture vendor on delivery, installation, and sequencing with construction.

SIGNAGE

- ☐ Confirm that code-required signage is included in the GC’s scope.
- ☐ Engage a signage vendor for branding, wayfinding, and custom graphics.
- ☐ Review signage locations and mounting requirements with your design team.
- ☐ Ensure wall blocking and power needs are documented in the construction drawings.

ARTWORK

- ☐ Plan for artwork and decorative elements that reflect your brand and culture.
- ☐ Engage an artwork vendor or coordinate selections through your furniture partner.
- ☐ Review proposed locations and hanging requirements early in design.
- ☐ Schedule artwork installation after construction completion but before occupancy.

PLANTS & GREENERY

- ☐ Work with a plant vendor to select species suited for your lighting conditions.
- ☐ Plan for planters or green walls that complement the interior design.
- ☐ Confirm delivery timing and maintenance service agreements.

MOVING & RELOCATION

- ☐ Engage a professional moving vendor to handle furniture, equipment, and supplies.
- ☐ Schedule your move to align with construction completion and furniture installation.
- ☐ Confirm movers coordinate with your I.T. and furniture vendors on timing and logistics.
- ☐ Distribute a move plan to all employees outlining packing responsibilities and timelines.

COORDINATE AND COMMUNICATE

- ☐ Share construction drawings with all ancillary vendors to define scope and connection points.
- ☐ Invite vendors to the construction kickoff meeting to ensure early alignment.
- ☐ Confirm vendor participation in progress meetings during construction.
- ☐ Work with your design team to review vendor proposals for completeness and compatibility.



Want to learn more about this stage in the process?
Check out our post: [Identifying and Selecting Ancillary Vendors](#).

MANAGING CONSTRUCTION

With design finalized and your GC selected, construction officially begins. Your GC manages day-to-day operations and scheduling, while your design team remains engaged to review progress, verify details, and ensure that the finished space aligns with the design intent. Clear communication and coordinated site visits keep the project on track from the first layout to final occupancy.

ESTABLISH THE CONSTRUCTION SCHEDULE

- ☐ Work with your GC to review the overall project timeline and milestones.
- ☐ Confirm your target move-in date and discuss a realistic buffer time for potential delays.
- ☐ Plan internal communications and contingency plans in case move-in dates shift.

CONDUCT KEY SITE REVIEWS

- ☐ Attend the Chalk Layout walkthrough with your GC and design team to confirm layout accuracy before framing begins.
- ☐ Participate in the Ceiling Close-In review to inspect HVAC, plumbing, and electrical systems before ceilings are enclosed.
- ☐ Join the Punch List walkthrough near project completion to identify outstanding items that need correction or completion.

MONITOR CONSTRUCTION PROGRESS

- ☐ Schedule regular project meetings with your GC, design team, and property manager.
- ☐ Ensure all vendors—such as furniture, signage, or technology providers—are included as installation approaches.
- ☐ Review progress photos, updates, and meeting notes to stay informed.
- ☐ Address issues quickly through collaborative discussion with your project team.

REVIEW SUBMITTALS & RFIS

- ☐ Have your design team review and approve material submittals to confirm compliance with design intent.
- ☐ Use the Request for Information (RFI) process to clarify questions that arise during construction.
- ☐ Track responses and updates to ensure consistent communication among all project members.
- ☐ Verify that approved materials and systems align with project requirements.

COORDINATE WITH ADDITIONAL TEAM MEMBERS

- ☐ Confirm the roles of other professionals, such as project managers, move coordinators, and property management representatives.
- ☐ Encourage collaboration among your GC, design team, and ancillary vendors during regular site meetings.

STAY FOCUSED ON COMMUNICATION & COLLABORATION

- ☐ Maintain open communication with your GC and design team throughout construction.
- ☐ Document and share all major decisions and approvals in meeting minutes or email summaries.
- ☐ Encourage a solutions-oriented approach to resolving any challenges that arise.
- ☐ Celebrate milestones and progress updates to keep morale high and momentum strong.



Want to learn more about this stage in the process?
Check out our post: [Managing Construction](#).

MOVE PLANNING

A successful move doesn't begin on move day—it starts months earlier. Careful planning, communication, and coordination minimize disruption and ensure a smooth transition into your new space. From purging and packing to scheduling vendors and securing occupancy permits, each step plays a role in keeping your move organized, efficient, and stress-free.

PLAN EARLY

- ☐ Start preparing for your move as soon as the decision to relocate is made.
- ☐ Set a realistic timeline that includes design, construction, and move-in milestones.
- ☐ Build in buffer days to account for potential schedule changes or delays.

PURGE AND ORGANIZE

- ☐ Review all furniture, equipment, and stored materials to decide what stays, goes, or can be donated.
- ☐ Encourage staff to declutter desks, files, and storage areas over time.
- ☐ Evaluate paper records and archives—determine what can be digitized or stored off-site.
- ☐ Securely dispose of confidential or obsolete materials following data and privacy guidelines.



SELECT AND SCHEDULE A MOVING VENDOR

- ☐ Request quotes from several moving companies and review their proposed scope and services.
- ☐ Confirm that each company has visited both your current and new spaces to provide accurate pricing.
- ☐ Discuss details such as crate quantities, building access, elevator reservations, and special equipment handling.
- ☐ Schedule your move date and confirm it aligns with construction completion and vendor installations.

COORDINATE CONSULTANTS AND INSPECTIONS

- ☐ Invite your ancillary vendors, such as I.T., A/V, furniture, and security, to attend progress meetings leading up to move-in.
- ☐ Confirm that all vendors understand their installation schedules and responsibilities.
- ☐ Work with your design team and GC to secure the Certificate of Occupancy (C of O) prior to move-in.
- ☐ Check if any vendors require additional permits or inspections for their systems and track these to completion.

PLAN FOR TECHNOLOGY TRANSITION

- ☐ Coordinate with your I.T. provider to schedule system shutdowns and relocation.
- ☐ Confirm when the internet service, network connections, and phone systems will go live in the new space.
- ☐ Test all systems before move day to ensure a seamless transition.
- ☐ Establish contingency plans for temporary remote work if needed.

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EXPECT THE UNEXPECTED

- ☐ Prepare for potential challenges such as elevator outages, shipping delays, or damaged materials.
- ☐ Build extra time into the schedule for unplanned repairs or vendor rescheduling.
- ☐ Stay flexible and maintain open communication with your project team and vendors.

MOVE DAY & SETTLING IN

- ☐ Confirm crate delivery, packing materials, and move-day logistics with your mover.
- ☐ Designate team leads to oversee move coordination at both the old and new locations.
- ☐ Walk the space with your design team after move-in to note any final adjustments or minor touch-ups.
- ☐ Encourage staff to unpack gradually and report any facility or technology issues promptly.
- ☐ Take time to celebrate—your new office is ready for work, collaboration, and growth.



Want to learn more about this stage in the process?
Check out our post: [Planning and Preparing for the Move](#).



NEXT STEPS

Every successful move begins with a plan—and ends with a space that feels distinctly yours. From early visioning to final occupancy, the process is about more than relocating—it's about creating an environment that supports your people, advances your goals, and reflects your identity.

At Interplan, we guide clients through every phase of that journey. Our integrated approach brings clarity to complex decisions, connects design intent to construction reality, and ensures your new workplace is as functional as it is inspiring. With decades of experience and a commitment to collaboration, we help transform the challenges of relocation into opportunities for renewal and growth.

Contact Interplan to learn more about how we can guide your next move—and design a space that's built for the way you work.



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