



## MOVING YOUR LAW FIRM

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In all likelihood this will be one of those articles which you will tuck away until you need it. For those of you who have experienced a law firm move before, you know that it is a daunting job. Contrary to the way most things operate, it is usually easier to move a larger firm than a smaller one. Why? One, large firms have a depth of administrative personnel who can take care of the countless details needed to ensure a smooth move. Two, large firms can usually afford to set up new space, complete with duplicate essential services like telephone, before moving into it. Smaller firms may not be able to afford that luxury.

I have had firms engage me to plan and oversee their move. I have also worked with firm which desire only some specific assistance here and there in areas which require specific skills; choosing to save dollars and orchestrate most of the move on their own. That's a smart money-saving solution which still serves to make the move run smoothly. Not to sound self-serving, but my opinion is that a small firm will inevitably spend more trying to do it all on their own.

Here's a typical example. At a 4-attorney firm the partner who took charge of the move admitted that his analysis afterward revealed that he had lost the equivalent of several months of billable hours by the time the move was completed. Worse, his hours were greatly extended for months, and his stress level, particularly where the installation of the new telephone and computer system were concerned, went through the roof.

At the time the decision was made to handle the move entirely themselves, no partner anticipated the high level of hours—or expertise—which would be required to get the job done. From a bottom-line perspective, it would have been far cheaper to hire someone to assist. Their logic was sound in understanding that even if they hired someone, they would not be relieved of all the time spent making decisions and selections. However, they failed to recognize and take into account the enormous amount of time spent in implementation, nor the skill set required to make sure it went smoothly.

Handling all of that on top of trying to serve clients was a recipe for disaster. And it was served up plentifully. So my words of advice for those of you in solo or

small firms is to get some assistance. No matter how tight the budget, let me assure you that it will enable you to keep your billable hours much higher, and your clients happier, not to mention your family, who probably don't see you enough already. That being said, I often get calls from attorneys and office administrators who want resources to help them handle a move efficiently. And that's the purpose of this article.

Ideally, start to plan your move 12 months in advance. What you want to accomplish at this point is to create your move "team" including identifying the project manager. You need to project how much space you will need by examining possible growth or attrition in personnel, whether office sizes need to increase or decrease, whether you need more conference room space, back office space, additional equipment and room to house it, and so forth. Once you have your target space requirement, you next need to take a look at your financial standing. You need to determine how much you can afford to pay, as well as create a reasonable budget for the move project.

Once you have this basic information, you should begin to search for your new space. This search doesn't necessarily exclude your current location. Landlords will often make extraordinary concessions in order to hold onto long-term tenants. There are a lot of considerations nowadays, depending on where your office is located — urban, suburban, or country — to ensure comfort, safety, ease of commute, building health, convenience for clients, image conveyed, ability to use space efficiently, and more. In order to make it easier to compare choices, have a checklist of factors which are important, and score each location on each factor.

Once you've identified the best space, begin your negotiations. You're lawyers, so I don't need to tell you that everything is negotiable, from a build-out allowance, to rent abatements, to number of parking spaces. Keep your bottom line firmly in mind. No matter how attractive the space, if you can't get it at a price which provides some breathing room in case business slows or someone departs the firm, it could turn into an albatross instead of an enjoyable work environment.

The process defined above may take anywhere from 1 to 3 months. The larger your firm and space requirements, the longer it may take. As soon as you have completed your negotiations, you need to move your project to the next phase.

Start by securing accurate blueprints of the space, and make sure they reveal which walls are permanent and cannot be moved. If you are going to make major



changes to the layout, or if it is new construction, you will need to hire an architect to help you prepare a layout. Note that in many cases the landlord may offer architectural design and/or contractor build-out service as part of the deal. Or maybe you will have an allowance, and can pick your own people.

Here is one place where having an experienced set of hands makes a real difference. Reading blueprints is not easy at all. They are separated on pages where electrical is on one page, HVAC on another, etc. It's so easy to miss what is *not* there. I found that using transparent sheets to overlay all the individual plans (each in a different color) so that I can see the interplay of all systems before a final sign-off, enables me to do a more thorough job. Remember that anything you change after signing costs extra, so it's important to do it right.

For one firm it became clear that there were no light switches anywhere. Lots of lights, but no switches on the plan. At another firm there was not one inch of floor space anywhere in the new design for the file cabinets which were inset and lining the walls at the current office. Were they to hang from the ceiling? At another firm, all the telephone jacks were on the wall aligned with the door opening. Not the correct place if you want a smaller office to appear larger, because the furniture should not be situated against the wall in front of the door.

If you're going to be able to reconfigure or design the space, you should consider reviewing "*The Complete Guide to Designing Your Law Office*" by Suzette and Jon Schultz (available at the ABA book store at a discount for PBA members). Also, don't hesitate to contact other members of your bar who have recently reconfigured or built space, and ask if you can tour their offices. Note what you like, and what you would do differently. Communicate your thoughts in a comprehensive checklist to your architect.

Modern design dictates smaller offices and more conference rooms, ideally located around the reception area, so that clients and other visitors don't pass by work spaces to reach conference rooms. At least one conference room should be a small personal space to meet with a client instead of in your office, where they may inadvertently see documents related to other clients. (Not to mention a mess!)

Libraries have shrunk considerably, and disappeared entirely at many firms. There may be a need for a few treatises, which can be housed attractively in inset shelving along a hallway outside of the office of the attorney(s) who use them, or inside an attorney's office if only one needs access. Everything else is electronic



nowadays, and much cheaper than devoting floor space to non-revenue producing use.

On the other hand, most firms underestimate the back-office space they will require for file storage (assuming they have not made significant strides in becoming paper-independent), bookkeeping and billing, equipment, meals, and so forth. I love when firms decide that they don't need even a tiny lunchroom, since they theoretically can use the conference room. The first time an attorney has a deposition or client meeting and discovers the room smells like an Italian hoagie, people will wind up eating huddled over their desks thereafter.

Litigation firms typically underestimate the amount of "war room" space that will be required; failing to take into account that cases may stall for significant lengths of time, but still require organization and staging space. If your firm does a significant amount of litigation, consider setting aside space that you do not finish significantly other than for HVAC and lighting. Fill the space with long sturdy cheap tables and tons of sturdy metal shelving designed to hold bankers boxes. It's far cheaper than using (losing) your nicely decorated conference rooms as war rooms. Better yet, digitize everything and use a litigation database manager like Summation or Concordance to manage it, and save the overhead entirely.

When you are somewhere in the 6 – 9 months prior to move, you have a lot of decisions to make. First, do you need subtenants? If so, you want to begin your search in earnest.

You should be inventorying your furniture to determine what will be usable, and what will need to be replaced or added. Make a plan for disposal, sale or donation of whatever you do not intend to reuse.

I've always been a big proponent of development of a "style" for the office. Within that, there can be individual choices, but you can limit the choices such that overall there is a cohesive feel to the office. Work with your vendor to create a storyboard with furniture and fabric choices, from which each person can select. This will enable you to control both style as well as budget.

Determine what equipment or processes needs to be changed, and assign project members to make sure that research is done so that well-informed decisions are made. Be sure orders are placed sufficiently in advance to ensure timely installation in your new space. Likewise, work with each vendor to determine



requirements for moving existing equipment. For items like telephone systems, network servers, and even copiers, there are minimum specifications as to temperature, floor space, and electrical, which must be incorporated into design plans before they are finalized.

By the time you are 4-6 months away from your move date, you should have signed off on design plans, determined costs for new furniture and equipment, and the move itself, and made adjustments as needed to keep within the firm's budget.

Get the names of several reliable moving companies who have worked with other law firms. Review cost estimates carefully before making your selection. Little items like whether your building will allow a weekday move or require a weekend to avoid disruption to other tenants, can make a huge difference in your final cost. Make sure that there are no scheduled construction projects near your current location, or your target location, which might increase move time and costs. Oh, and don't forget to discuss excess moving insurance.

Remaining orders should be placed. There can be considerable lead time required, so order as early as possible once a decision is made. On the other hand, be sure you are clear with each vendor as to who is responsible to store items which arrive in advance of your move date. You may need to arrange for a suitable storage facility, and that is not a detail you want to deal with at the last moment.

Be sure you have ordered any custom window coverings, carpeting, or any other special finishes at this point. Your project manager should create a spreadsheet to track each order, and update the status regularly. With so much going on, it's easy to forget to check into the status of the floor tile or draperies, or conference room furniture, until it becomes too late to avoid disruption of your timeline.

If the landlord is not providing construction services, you need to send your final sets of plans to contractors for construction bids. Make sure that before you sign on the dotted line you include penalties for late completion, as well as designated points for inspection and no-cost corrections to deviations from the plans. Make sure your architect is included in the inspections. A highly trained eye will catch deviations and defects with ease, which you might otherwise overlook.

By the time you are 3 months from your move date, you should be well under way with construction, have your orders placed, and feel comfortable with your final move budget. Now is the time to begin the clean-up of your current space. Purge files. Get rid of items which will not be moved if they are not in use. Arrange for disposition of what will remain and not move.

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Think through the final determinations of who and what goes where. Create a floor plan which has a number and color for each designated room or work area, and label it. Start talking to employees about the logistics of the move. Some may need considerable notice if they will be required to assist over a weekend. Some will have special concerns about their new workspace, which will need to be addressed.

You should have the logistics well under way for your mission critical technology infrastructure: telephone, computers, and additional equipment such as copiers, printers, faxes and scanners.

Start to include announcements of your upcoming move as you mail items. Include them with payments to vendors. Include them with each signed purchase order. Include them with invoice mailings to clients. Include them in newsletters to prospects. Get your mailing lists updated and ready for more timely and complete notification.

One month before your move you should be developing specific time schedules for people, scheduling services such as building elevators, post-move cleaning and damage repair, and depending on your office location, you may even need security guards to watch furniture and equipment while it is sitting outside the old or new building waiting to be moved.

One week prior to your move everyone should have personal items taken home so that they do not get damaged or lost during the move. Everyone should have move instructions, a floor plan, and color dots that match their area on the floor plan, which they should put on everything they pack. The move coordinator should also put a corresponding color dot (and room number if applicable) on display in the new office at each location. Since there are only so many color dots available, larger firms may need a combination of room number and color. By coding everything clearly, the movers can complete their work more efficiently, which translates into dollars saved. And it is more likely that things will wind up where they belong at the other end.

Monitor weather, and be prepared for contingency planning if necessary. While a move may still take place during inclement weather, you may not be able to count on a full complement of office staff assisting. Be prepared to hire substitutes, or communicate a delay in reopening to clients.

On move day your team should be able to communicate effortlessly, with some at the new location, and some at the old location. If cell phone service may be an issue, get some decent walkie-talkies in advance.



Efficiency (and cost) will depend on well-executed plans with good timing. Bottlenecks can create expensive delays. There is only so much elevator space, or room on the loading dock, at one time. So make sure that people know when it's "their turn" and are ready at the specific time.

I will never forget trying to move an office when one attorney refused to stop working and allow his office to be packed, all while the movers were standing at the door, and dollars were flying out the window. I wound up personally rolling him, in his chair working on his laptop, into the elevator. He stubbornly protested all the way, until I got his chair over the hump into the elevator, and pressed "L" and stepped back while the door closed. Sure, it's funny now. But at the time I thought I would have a stroke! Lesson learned: discuss client needs with attorneys a few days in advance in order to make sure that pressured attorneys have everything they need to work from home on move day if necessary.

Be sure to search online for the firm as well as every attorney in the firm by name in order to locate every listing and update each. Put a news release about the change on your web site. Be sure to put a tickler in your calendar to renew your postal forwarding before the expiration of six months, so you can get a complete year of forwarding. Monitor inbound mail closely, so that you can remind people to update their address record. Whenever possible, be sure to attach the original mail label to your change of address notification. It will speed correction.

Experience dictates that the courts and administrative agencies are very slow to update records, so you will need to be vigilant regarding following up on matters proactively, until you can confirm that the address change has been made. For that reason, you should personally mail notification of the address change in advance to all parties involved in a matter as well.

You may download a PDF or Word-formatted ***Moving To-Do Checklist*** directly to your computer from <http://tinyurl.com/PBA-Move>. When you add it to this article, you'll be prepared for the challenge. Happy moving day!

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