

# ***RELOCATING: Your Guide To A Successful Move***

**“An Organized, Easy-To-Follow Approach To Moving”**

**PREPARED BY**



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## Our Services

**Imagine-It-DONE, LLC** is a professional organizing service that offers complete services: Relocation and Move Planning, File and Paper Management, Organization and Space Redesign and Time and Schedule Management. While some or all of these areas may be needed throughout the move cycle, this manual is dedicated specifically to **Relocation and Move Planning**.

Relocation can be a very exciting time filled with feelings of adventure and anticipation. It can also be a time of worry, uncertainty and dread. With this event, come many important life changes and decisions. Some of them can be overwhelming such as: changing jobs or careers, changing schools, changing climates, changing neighborhoods and leaving friends and family behind. Our Relocation and Move Planning Services are designed for you to have a chaos free, successful moving experience. We offer “customized” services that will provide you with what you need, when you need it, therefore allowing you more time to focus on the more important, life changing aspects of your move!

If relocating is in your near future, then ask yourself the following questions:

1. Do you feel overwhelmed?
2. Are you unsure about where to begin, what the next step is or how many steps there are?
3. Are you wondering how you will find the time or energy to plan your move, pack AND perform all the moving tasks?
4. Would you feel more assured and relaxed if your move was handled by professionals who have managed big projects before and know exactly what to do and when to do it?

If you answered, “**yes**” to any of these questions, then **Imagine-It-DONE, LLC** is your answer.

### **Here are some of the highlights of our services:**

- ✓ *Manage your entire move from the initial planning to post-move settling.*
- ✓ *Perform specific aspects of your move in just those areas where you need assistance.*
- ✓ *Design a customized move plan and strategy that identifies the services you need, the tasks that need to be done and the timeframe they need to be completed in.*
- ✓ *Help you define the complexity of your move based on your move timeframe and requirements.*
- ✓ *Assist you with preparing your home so that it is appealing to potential buyers and will sell quickly.*
- ✓ *Assist you in sorting through your belongings to determine what to take or leave behind.*
- ✓ *Coordinate and schedule the activities of third parties such as: the packers, movers, cleaning services, repair services, painters and other parties who may be involved in your move.*
- ✓ *Determine how best to utilize and maximize the space in your new home.*
- ✓ *Determine the arrangement of furniture and belongings in your new home.*
- ✓ *Notify third parties about your move from: change of address, to discontinuation of services in the existing location and initiation of services in the new location, to transferring records.*
- ✓ *Research your new community for essential services such as: schools, childcare, children's programs, religious affiliations and other services.*

**Contact us today for a FREE consultation!**

# About This Guide

## OUR APPROACH

We developed this guide to provide you with everything you need to relocate in an organized, systematic manner. Our approach to this manual and to the relocation process is described below.

- ✓ Relocation is a “*process*” with a series of phases. You can view your move as a “*continuum of stages*.” You determine what stage you are in, what aspects remain, and where you need the assistance.
- ✓ Relocation can be viewed using a “*drill –down*” approach. You *first* view the relocation from a “*big picture perspective*” by looking at the high-level phases, *then* the subcategories within a phase, and *finally* specific tasks that must be accomplished. All levels are interrelated.

## THE STRUCTURE AND CONTENT

Obviously, there are many ways of accomplishing a move. To help define, structure and organize moving, we have identified five major move phases, which are represented in five corresponding sections in this manual.

Each phase contains subcategories that may or may not apply, depending on the particulars of your move. Each subcategory has its own set of reference guides and tasks that are located within the section it applies to. For example, the **Packing Phase** has two subcategories: **Do-It-Yourself: Packing** and **Utilizing A Service: Packing**. You may decide to do all of the packing yourself, in which case only the “Do-It-Yourself” tasks and related materials will apply. However, you may choose to pack some items AND utilize a service to pack the rest. In that case, you would want to review both sections.

The last section of the guide includes a list of tools in alphabetical order. Any time a tool can be utilized to complete a task or assist you, the Task Lists and/or the Reference Guides will reference it.

- ⇒ The **REFERENCE GUIDES** provide detailed information and tips about move topics such as: finding a reputable mover, the ins and outs of corporate relocation, packing techniques, and more. They are designed to provide you with important information regarding how best to proceed, what options are available, strategies that may apply, any potential risk factors. The reference guides should be read first, followed by the task lists.
- ⇒ The **TASK LISTS** represents action steps or “To Do’s” that are necessary to complete a subcategory.
- ⇒ The **TOOLS** are checklists and forms that are designed to help you acquire, organize, analyze and track information. They facilitate the completion of certain tasks and help you to maintain structure and organization to getting things done.

## USING THIS MANUAL

Review the “**Phase Overview Table**” on page 6 to familiarize yourself with the five move phases and their respective subcategories. Depending on what move stage you are in, you may already have completed certain move phases or subcategories within a phase. For example, you may have already selected a mover, but have not started preparing for packing. In that case, you can skip the tasks and related tools for selecting a mover. However, we do recommend that you read the reference guide for those sections that you have completed to make sure that nothing has been overlooked.

If you are just beginning the move process, start with “**Phase 1 Move Assessment.**” First, read the reference guides in this section. The reference guides are grouped together followed by the entire task list for that phase. This was deliberate so that all relevant material for a phase can be presented together. Next, review the Task Lists for the sections that apply to your move. Most of the tasks will apply to your move, however some may not. You may tailor the task lists by Indicating “N/A” in the “Done (✓)” column if the task does not apply to your move.

## About This Guide

The “Target Complete Week” column indicates the week that the task should typically be completed prior to the move date. (The week number provided is based on an 8- week lead- time prior to the move date.) A check “√” should be placed in the “Done (√)” column to indicate that the task is **completed**. Lastly, the “Notes” column is for you to indicate any comments or questions you may have related to a particular task.





### Example

Below is an example of a Task List for the subcategory: “**Evaluating Scope, Complexity, Risks & Needs.**” You will note that there are four individual tasks listed for this subcategory. The recommended completion timeframe for these tasks is eight (8) weeks prior to moving.

Evaluating Scope, Complexity, Risks & Needs				
Task ID	Item Name	Target Complete Week	Done (√)	Notes
1.	Read “ <b>Evaluating the Scope, Complexity, Risks &amp; Needs of Your Move Project</b> ” reference guide.	8		
2.	Set a move date so that you can begin to formulate a move plan.	8		
3.	Complete the “ <b>Move Assessment Tool</b> ” to assess your move complexity, scope, needs and time requirements located in the Tool section.	8		
4.	Understand the differences between your current and new homes by completing the “ <b>Home Comparison Tool</b> ”, if you have secured a new home located in the Tool section.	8		

### ICONS

Icons are used throughout this manual to assist you in locating reference materials and tools and to draw your attention to certain aspects.

	<b>Imagine-It-DONE, LLC</b> - This icon indicates areas where a professional organizer can be of assistance.
	<b>TOOLS</b> - This icon indicates that a tool is available to assist you in completing a task.
	<b>REFERENCE GUIDE</b> - This icon indicates that reference materials are available on the subject.
	<b>KEY POINTS</b> – This icon highlights or summarizes certain points covered in the reference guide. Key points are located at the end of each reference guide.

### GENERAL MOVE SCHEDULE

The “**General Move Schedule**” depicts a schedule of a move project based on an 8-week schedule. It outlines each move phase and the subcategory activities that need to occur each week. Some of the move phases and subcategories overlap with each other. This means that you could be working on two phases or two subcategories at the same time or ending one and beginning another.

### TABLE OF CONTENTS

There are two sets of “**Table of Contents.**” The first one outlines everything in the manual so that you can easily find the reference guides, task lists and tools. The second one outlines the topics or sections *within* each reference guide. This table of contents is useful if you are looking for a particular topic.

## Phase Overview Table

<b>PHASE 1 Move Assessment</b>	<b>PHASE 2 Planning &amp; Preparation</b>	<b>PHASE 3 Packing Phase</b>	<b>PHASE 4 Moving Phase</b>	<b>PHASE 5 Post-Move Phase</b>
Evaluating Scope, Complexity, Risks & Needs of Your Move Project	Preparing Your Home For Sale	Do-It-Yourself: Packing	Do-It-Yourself: Moving Out	Settling Into Your New Home
Estimating Move Costs & Budget Preparation	General Move Preparation	Utilizing A Service: Packing	Do-It-Yourself: Moving In	
Corporate Relocation	Preparing Your Home For Packing		Utilizing A Service: Moving Out	
Tax-Related Expenses	Preparing Your New Home		Utilizing A Service: Moving In	
	Selecting A Moving/Packing Company			
	Selecting A Rental Truck			
	Selecting An Offsite Storage Company			

## General Move Schedule

(Based on an 8-Week Move Project)

PHASES	WEEK 8	WEEK 7	WEEK 6	WEEK 5	WEEK 4	WEEK 3	WEEK 2	WEEK 1	MOVE DAY	1 WEEK AFTER
<b>MOVE ASSESSMENT PHASE</b>										
Evaluating Scope, Complexity, Risks & Needs	----->									
Estimating Move Costs & Budget Preparation	----->	----->	----->	----->	----->	----->	----->	----->	----->	----->
Corporate Relocation	----->									
Tax-Related Moving Expenses	----->	----->	----->	----->	----->	----->	----->	----->		
<b>PLANNING &amp; PREPARATION PHASE</b>										
Preparing Your Home for Sale	----->									
General Move Preparation	----->	----->	----->	----->	----->	----->	----->	----->		
Preparing Your Home for Packing		----->	----->	----->	----->	----->				
Preparing Your New Home		----->	----->	----->	----->	----->	----->	----->		
Selecting A Moving/Packing Company		----->	----->	----->	----->					
Selecting A Rental Truck		----->	----->	----->	----->					
Selecting An Offsite Storage Company		----->	----->	----->	----->					
<b>PACKING PHASE</b>										
Do-It-Yourself: Packing		----->	----->	----->	----->	----->	----->			
Utilizing A Service: Packing			----->	----->	----->	----->	----->			
<b>MOVING PHASE</b>										
Do-It-Yourself: Moving Out		----->	----->	----->	----->	----->	----->	----->	★	
Do-It-Yourself: Moving In									★	
Utilizing A Service: Moving Out					----->		----->		★	
Utilizing A Service: Moving In					----->				★	
<b>POST-MOVE PHASE</b>										
Settling into Your New Home										-----...

# TOOL SECTION

## "Truck Rental Interview Form"

<b>PHASE 1: MOVE ASSESSMENT .....</b>	<b>16</b>
Reference Guides.....	16
EVALUATING THE SCOPE, COMPLEXITY & RISKS OF YOUR MOVE PROJECT.....	16
ESTIMATING MOVING COSTS & BUDGET PREPARATION.....	19
CORPORATE RELOCATION .....	22
TAX-RELATED MOVING EXPENSES .....	23
Tasks .....	26
EVALUATING SCOPE, COMPLEXITY, RISKS & NEEDS .....	26
ESTIMATING MOVE COSTS & BUDGET PREPARATION .....	26
CORPORATE RELOCATION .....	26
TAX-RELATED MOVING EXPENSES .....	26
<b>PHASE 2: PLANNING &amp; PREPARATION.....</b>	<b>28</b>
Reference Guides.....	28
PREPARING YOUR HOME FOR SALE.....	28
THE SORT YOUR STUFF PROCESS .....	32
PREPARING YOUR HOME FOR PACKING .....	36
HOLDING A SUCCESSFUL GARAGE SALE .....	38
PREPARING YOUR NEW HOME .....	40
SELECTING A MOVING/PACKING COMPANY.....	42
SELECTING A TRUCK RENTAL COMPANY.....	50
SELECTING AN OFFSITE STORAGE COMPANY.....	52
Tasks .....	54
PREPARING YOUR HOME FOR SALE.....	54
GENERAL MOVE PREPARATION .....	54
PREPARING YOUR HOME FOR PACKING.....	56
PREPARING YOUR NEW HOME .....	57
SELECTING A MOVING/PACKING COMPANY.....	59
SELECTING A RENTAL TRUCK COMPANY.....	59
SELECTING AN OFFSITE STORAGE COMPANY.....	60
<b>PHASE 3: PACKING .....</b>	<b>62</b>
Reference Guides.....	62
DO-IT-YOURSELF: GENERAL PACKING GUIDELINES.....	62
DO-IT-YOURSELF: SPECIFIC PACKING GUIDELINES .....	64
DO-IT-YOURSELF: PACKING MATERIALS GUIDE .....	67
DO-IT-YOURSELF: SELECTING BOXES AND CARTONS GUIDE.....	68
UTILIZING A SERVICE: PACKING.....	69
Tasks .....	72
DO-IT-YOURSELF: PACKING .....	72
UTILIZING A SERVICE: PACKING.....	73
<b>PHASE 4: MOVING .....</b>	<b>74</b>

**TOOL SECTION**  
**"Truck Rental Interview Form"**

<b>Reference Guides.....</b>	<b>74</b>
<b>DO-IT-YOURSELF: MOVING OUT.....</b>	<b>74</b>
<b>DO-IT-YOURSELF: MOVING IN.....</b>	<b>76</b>
<b>UTILIZING A SERVICE: MOVING OUT.....</b>	<b>78</b>
<b>UTILIZING A SERVICE: MOVING IN.....</b>	<b>80</b>
<b>Tasks.....</b>	<b>82</b>
<b>DO-IT-YOURSELF: MOVING OUT.....</b>	<b>82</b>
<b>DO-IT-YOURSELF: MOVING IN.....</b>	<b>82</b>
<b>UTILIZING A SERVICE: MOVING OUT.....</b>	<b>83</b>
<b>UTILIZING A SERVICE: MOVING IN.....</b>	<b>83</b>
<b>PHASE 5: POST-MOVE.....</b>	<b>84</b>
<b>Reference Guide.....</b>	<b>84</b>
<b>SETTLING INTO YOUR NEW HOME.....</b>	<b>84</b>
<b>Tasks.....</b>	<b>86</b>
<b>SETTLING INTO YOUR NEW HOME.....</b>	<b>86</b>
<b>TOOL SECTION.....</b>	<b>88</b>
<b>Color-Coded Labeling System.....</b>	<b>88</b>
<b>Estimated/Actual Moving Expenses Form.....</b>	<b>94</b>
<b>Existing Home-Packing Strategy Checklist.....</b>	<b>98</b>
<b>Existing Home-Preparing Your Home For Sale Checklist.....</b>	<b>102</b>
<b>First Day Essentials Checklist.....</b>	<b>106</b>
<b>Home Comparison Tool.....</b>	<b>108</b>
<b>Keep-With-You Items Checklist.....</b>	<b>110</b>
<b>Inventoring Items For Storage - Example.....</b>	<b>112</b>
<b>Inventory Items For Storage.....</b>	<b>114</b>
<b>Move Assessment Tool.....</b>	<b>116</b>
<b>Move Company Bid Evaluation Form.....</b>	<b>120</b>
<b>Move Company Interview Form (Intrastate/Interstate).....</b>	<b>122</b>
<b>Move Company Interview Form (Local).....</b>	<b>124</b>
<b>Move Day Final Checklist.....</b>	<b>126</b>
<b>Move Notification Checklist.....</b>	<b>128</b>
<b>Move-Related Files Checklist.....</b>	<b>146</b>
<b>New Home – Room Layout &amp; Upgrade Checklist.....</b>	<b>148</b>
<b>Offsite Storage Bid Evaluation Form.....</b>	<b>152</b>
<b>Offsite Storage Interview Form.....</b>	<b>154</b>
<b>Room Layout Tool.....</b>	<b>156</b>
<b>Sorting Supplies Checklist.....</b>	<b>158</b>
<b>Truck Rental Bid Evaluation Form.....</b>	<b>160</b>
<b>Truck Rental Interview Form.....</b>	<b>162</b>