

RELOCATION CHECKLIST  
FOR  
STORE MANAGERS

## **PRELIMINARY CHECKLIST**

- Analyze feasibility of moving to a new location.
- Complete Site Selection Chart similar to sample chart provided.
- Conduct customer survey.
- Study demographics of new site.
- Contact corporate office to arrange a preliminary site visit.
- Review current and proposed property leases.
- Investigate zoning ordinances and signage guidelines.
- Apply for building permit.
- Prepare a budget. Include expenses for fixtures, renovation, and marketing.
- Meet with accounting department to forecast sales, liabilities, and other expenses.
- Meet with area loan officers.
- Checklist for Store Owners—Prior to Move
- Determine length of time required to pack, move, and unpack.
- Determine length of time required to display and price merchandise.
- Determine number of days required for occupancy of both locations.
- Review insurance requirements and update policies.
- Contact utility companies and notify the business and billing offices of move date and request for change of service.
- Notify bank and credit card processing service.  
Change address on account and order new checks, deposit slips, and deposit stamp.
- Determine need for security system.
- Back up computer system.
- Contact vendors and other suppliers.
- Notify the post office and carrier services.

## **CHECKLIST FOR STORE OWNERS—STAFF**

- Create a schedule for employees. Include two weeks prior to the move and two weeks following the move.
- Determine if additional staff is required.  
Advertise and accept applications.
- Plan employee orientation and training.
- Determine uniform needs.

### **CHECKLIST FOR STORE OWNERS—MARKETING**

- Review marketing budget.
- Prepare news release announcing move to new location.
- Advertise grand re-opening.
- Notify customers of move.  
Send postcards.  
Place signs in store.  
Prepare maps and distribute.
- Change answering machine message.
- Update store Web site.
- Order business cards and stationery.

### **CHECKLIST FOR STORE OWNERS—INVENTORY**

- Determine merchandise to order.
- Evaluate in-store inventory and move selected items to clearance.
- Determine inventory space available at new site and adjust inventory levels.
- Plan a moving sale to reduce inventory prior to move.

### **CHECKLIST FOR STORE OWNERS—VISUAL MERCHANDISING**

- Study layout of new store.
- Implement Feng Shui principles where possible.
- Evaluate need for additional fixtures and signage.
- Contact local sign company to move existing exterior sign or purchase new sign.
- Order fixtures, floor covering, etc.
- Contact painters, plumbers, and electricians.

### **AFTER THE MOVE**

- Check fire extinguishers and smoke detectors.
- Create list of emergency numbers.
- Change answering machine message.
- Evaluate inventory and reorder.
- Contact locksmith to have locks changed and new keys made.
- Update mailing list.
- Plan an “Open House.”
- Check sound system.

## SITE SELECTION CHART

<b>SITE NUMBER</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>
Address				
Dimensions				
Square Feet				
Parking				
Neighboring Businesses				
Traffic Count				
Comments:				