

Corporate Relocation Planning Checklist

A step-by-step guide to planning a smooth and successful corporate move

PHASE 1: Set Clear Objectives & Policies

- Define the goals and objectives of the relocation clearly.
- Develop a comprehensive relocation policy covering:
 - *Eligibility criteria*
 - *Support services available*
 - *Compensation packages*
 - *Reimbursement guidelines*
- Outline property requirements: budget, preferred location, and amenities.

PHASE 2: Create a Personalised Relocation Plan

- Tailor a plan to the specific needs of the relocating employee and their family.
- Consider the following factors:
 - *Family dynamics and personal circumstances*
 - *Lifestyle preferences and daily needs*
 - *Housing requirements and property preferences*
 - *Cultural adjustments for the new location*
- Appoint a dedicated relocation coordinator (in-house or external).
- Ensure the coordinator is the primary point of contact for housing, transport, and settling-in.

PHASE 3: Declutter & Pack Belongings

- Declutter before packing — sell or donate items no longer needed.
- Research prohibited or restricted items in the destination country.

- Dispose of restricted items before departure to avoid extra costs.
- Begin systematic packing once decluttering is complete.

PHASE 4: Plan for Children & Pets

- Involve children in the moving process — let them choose items to bring.
- Ensure pets have up-to-date identification tags.
- Confirm all pet vaccinations are current before travel.
- Research pet import requirements for the destination country if applicable.

PHASE 5: Research the New Location

- Research the cost of living in the new area.
- Look into local schools and childcare options.
- Find nearby healthcare facilities and services.
- Explore the local climate, transport links, and community amenities.

PHASE 6: Handle Financial & Administrative Matters

- Notify banks and credit card companies of the upcoming move.
- Update billing addresses for all accounts.
- Clear all outstanding bills before leaving.
- Review and update insurance policies to ensure coverage in the new location.

PHASE 7: Hire a Reliable Relocation Service Provider

- Research relocation service providers with a strong reputation and proven experience.
- Discuss the range of services they offer (packing, transportation, settling-in support).
- Review and compare pricing structures.

- Confirm logistics and finalise service agreements before the move date.
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Use this checklist to stay organised and ensure nothing is overlooked during your corporate relocation.