

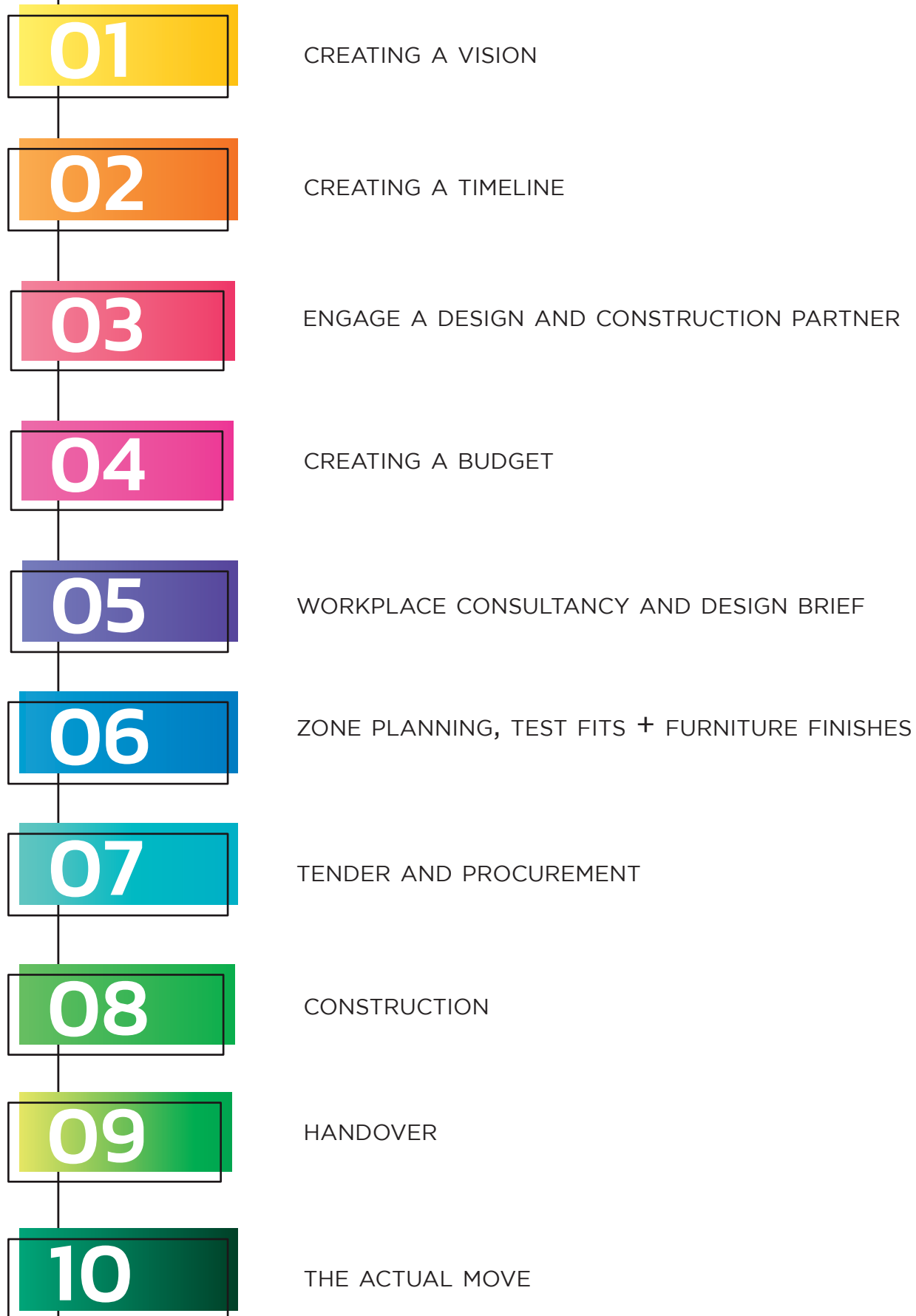
Office fit-out checklist

A GUIDE TO YOUR OFFICE FIT-OUT AND RELOCATION



TRUE

10 steps to a successful fit-out.



Create a vision.

Starting with a vision or strategy for what you want is a great way to plan for success. Take into consideration what your staff require from a modern workspace, its location, the cost associated with that location, how frequently clients will be attending the premise and do they need to be catered for. Relocating your business to a new building or extending the lease on your present building is a very big decision that will affect your business for years to come. Start by confirming exactly why you need a new workplace and what you would like to get out of it.

- ☐ What are your growth plans? What turnover is forecasted for 5 years, for 10 years etc.?
- ☐ What does this imply in terms of staff numbers?
- ☐ Will the building provide for the needs of the staff, and will it attract the quality of personnel your organisation needs when recruiting?

Consider why you are looking to carryout out an office fit-out:

- ☐ Lease event (lease expiry / break option)
- ☐ Expansion / contraction / merger / acquisition
- ☐ Change of business location
- ☐ Business requirement to reduce overheads
- ☐ Change in working practices / increase in productivity

When deciding on the ideal location you should consider the following:

- ☐ Where your present and target customer-base is centered
- ☐ Where your key staff live
- ☐ Accessibility by road / rail / air
- ☐ Amenities and Facilities for staff to access nearby

Create a timeline.

Controlling your relocation timeline is a critical component of any fit-out project, whether you intend to relocate or renew, giving yourself ample time will enable you make the right commercial decision, negotiate the best deal and be able to get your fit-out for the best price. Below we have outlined a typical “relocation” timeline to show the time you should allow for each stage, our goal is to always allow more time, in case unforeseen delays occur.

☐ **Property Search Phase - 6 Months**

It is recommended to start thinking about relocating or renewing at least 12 months before lease expiry. This will allow you to create your vision and go out to the market to see what options are available. It is highly recommended to conduct a property search even if your intention is to stay put, your landlord will be more motivated to table an attractive “Stay Package” if they think you are a flight risk. You should allow 6 months for property search, selection and lease negotiation.

☐ **Design - 2-3 Months**

It is important to allow sufficient time to the Design Phase to ensure the design can be refined, perfected and to keep within budget parameters. The design stages listed below are outlined in more detail on the following pages

- Workplace Strategy / Discovery
- Concept Design - layout
- Detailed Design - Finishes, Furniture and Fixtures specification.
- Tender Documentation
- Construction Set

☐ **Procurement - 1 month**

To get the best price for your project it's advisable to allow a 2 week tender period to allow the trades to accurately price. 1 week allowance for tender analysis followed by a week to negotiate and procure the selected contractors..

☐ **On-site Delivery - 2 months**

Projects up to \$2m in value should typically be able to be delivered in a 2 month period. If your project is over \$2m allow an additional 2 weeks per \$1m spend..

Engage a specialist.

The selection of your design and construct specialist is one of the most important you'll make. Research is the key to finding the company that best aligns with your organisation's ethos and beliefs. Find out what their values are, check out their client testimonials. A good indicator is if the contractor has repeat clients, they will only re-engage if they are happy with quality, value and service offering.

☐ **ECI - Early Contractor Involvement**

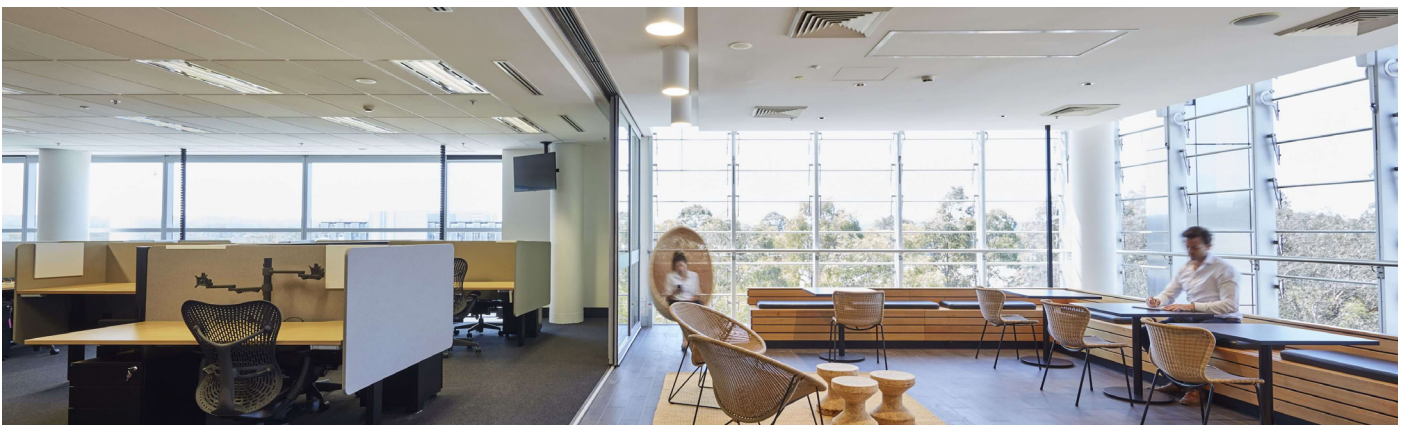
By selecting your Design and Construct partner in the property selection phase they will be able to provide you with service offerings that will assist you in finding the right property and getting the best possible deal:

- Due diligence - identify potential issues so the landlord has to rectify prior to lease signing
- Test fits - to confirm the space you are looking at can accommodate your business needs, for both current day and future growth
- Production of high level budgets so you are fully informed on financial exposure, very useful with incentive negotiations

☐ **Specialist Consultants**

Your Design and Construct partner will also be able to recommend and engage Specialist Consultants on your behalf, these may include:

- Tenant Advisor / Leasing Agent Broker
- Services Engineers
- Access Consultants
- Acoustic Engineers
- Structural Engineers
- Heritage Consultants
- AV / IT Consultants



Create a budget.

Cost is a huge factor for every company considering a relocation. There are many components to a fit-out as we've outlined below. It's imperative you select a Design and Construct (D&C) partner you trust so that they can advise you on setting your fit-out budget. Setting the right budget at the start of the project enables your designer to work within the budget parameters.

☐ **Cost per square meter budget**

As a general rule of thumb for a fit-out in the 500sqm to 1,500sqm range budgets can be classified into the following:

- \$700 - \$1000 - Low range / Entry level
- \$1100 - \$1700 - Mid-Range
- \$1800 - \$2500 - High End
- \$2600+ Luxury High End

☐ **Where will your budget be allocated?**

The below list breaks down your cost per sqm inclusions:

- Consultants - Designers, Services Engineers etc
- Council Approvals, Levies and Charges
- Project Preliminaries and Resources
- Demolition, Partitions, Ceilings and Doors
- Electrical, Mechanical, Hydraulic and Fire Services
- Flooring, Carpet and Vinyl
- Tiling Wall & Floor
- Furniture & Joinery
- Audio Visual, Security,
- Painting, Signage
- Blinds & Window coverings
- Builders Margin



Design Brief.

Your workplace fit-out specialist can work with you through the briefing process in a collaborative way to ensure both parties get the detail they need. The results from the briefing and workplace consultancy phase will provide the foundation to create an office that takes account of how your staff are making use of the current space and best reflects how they work. Below are some thought starters that your design process should include:

☐ **Block Planning**

Prior to the Discovery Phase whilst in the Property Search your design partner should be able to provide some block planning on the shortlisted tenancies to assist with the selection process. With just some basic information about headcount, offices or open plan and meeting room requirement a designer will be able to turnaround a blocking plan pretty easily.

☐ **Workplace Consultancy / Discovery Phase**

Workplace Consultancy or Discovery is fundamental first step in the design process, a designer should take the time to understand how you and your business works. This should be conducted through interviews, workshops and observation. Its important for the designer to know the aspirations of the leadership team so they can be translated into the design. This foundation of knowledge should allow your designer to challenge your thinking and propose ideas relating to the evolution of the workplace.

☐ **The Design Brief**

The Discovery phase should result in a Design Brief that you can review and sign off on. The brief should capture all aspects of what your new office should contain. It's the blueprint that can be applied to whichever tenancy you select.



Thought starters.

☐ **Are you:**

- Refurbishing your current office?
- Relocating to a new office?

☐ **What are the primary drivers behind your new office?**

- End of lease
- Merger
- Growth
- Downsizing

☐ **What type of workplace style do you want to create?**

- Open plan with assigned seating
- Open plan with unassigned seating
- Open plan and private offices
- Agile environment - team zones
- ABW environment - no team zones

☐ **What does your office currently look like?**

- What's your current headcount?
- What is the projected headcount growth in the next 5 years?
- How many meeting rooms and are they sufficient?
- Boardroom functionality?
- Do you require private offices?
- Do you require a reception?
- Do you require visitor seating?

☐ **Are there any issues you are trying to resolve?**

- Lack of collaboration
- Getting the team back onto the office
- Getting people out of offices
- Siloed business units
- Increased flexibility
- Reducing overhead
- Staff retention
- Attracting new talent

Test fits + Furniture.

☐ **Concept Designs**

Once the brief is finalised your designer will produce layout drawings to illustrate how your brief translates into the space. This should incorporate all aspirations mentioned in your design brief. You should expect a few revisions from the initial concept as you evolve the design. It is critical to ensure all stakeholders approve each design stage prior to commencing the next stage.

☐ **Mood boards**

Most designers will provide you with mood boards showing a variety of themes and colours, including fabrics and finishes that will really help you and to visualise how the new office will look, and gain a better understanding of the quality of the finished product or allowing you to make the necessary changes before it's too late.

☐ **Visuals + 3D**

Depending on your budget, your designer may provide you with 3D's of their design proposals. These will allow you to visualise the space, as many people struggle to picture a space from a 2d plan. They are an excellent way of communicating the design to staff and senior management and will help to get all key stakeholders on board. For an additional cost it should also be possible for your designer to provide a 3D walk-through to truly experience the office,

☐ **Furniture + Finishes**

Once the test fits and 3D walk-through has been finalised, the fun part begins with choosing the furniture and finishes for your office fit-out. This is what brings the WOW factor to the fit-out. Your designer will recommend the best options for you that fit with your branding, budget and timeline. We recommend taking the time to visit showrooms to ensure you touch and feel what is being proposed

☐ **Documentation**

When all the above has been finalised, your designer and service engineer will provide you with detailed tender drawing packages showing every minute detail of the fit-out design, a thoroughly documented design pack will ensure the trades price with accuracy, a poorly documented design pack can cause ambiguity of understanding and the potential for post tender variations.

Procurement.

To ensure you get “best market” rate your D&C partner should tender the project out to a minimum of 3 sub-contractors per trade. This will ensure that you’ll be able to compare the quotes against your cost plan to ensure the sub-contractors have priced the full scope of their package of works.

☐ **Tender Documentation**

Insisting on a thoroughly documented tender package will help the sub-contractors to accurately price their scope.

☐ **Sub-Contractor Selection**

It’s advisable to ask your D&C partner what their selection process is for the sub-contractors they are putting on the tender list. To reduce risk we would recommend the following:

- They have an existing relationship, proven to deliver good work
- They are financially secure, de-risking if they could potentially go bust
- They have the resources available to meet the programme

☐ **Tender Timeline**

It’s important to allow sufficient time in the tender period, the sub-trades need time to digest the drawings, visit site and calculate the costs of their scopes of work. Your D&C partner will also require time to do the tender analysis and work through clarifications with each of the trades. If you have engaged an Open-book D&C partner they will show you all of the quotes and together you should agree on which sub-contractor per trade to engage.

☐ **Procurement**

Once the selections have been made your D&C partner should begin the engagement of the sub-contractors. This important step should have a clear scope of works and a contract.



Construction.

The next step is the on-site delivery of your project. The most important aspect of any fit-out is Safety. Your D&C partner should provide a safe work environment and have the correct safety procedures in place to ensure risk of injury is kept to a minimum. All construction projects should have a full time site manager. The site manager is responsible for Safety, Build Quality and Programme Management. They are essential for insurance purposes.

☐ **Site Establishment**

You should ensure that a Dilapidation Report is produced when establishing site. This report documents the existing condition of the tenancy, in particular any damaged areas should be documented so the landlord doesn't try to claim that the damage was caused during the fit-out process. All relevant site signage should be displayed, site amenities should be provided for the sub-contractors.

☐ **Safety Management**

The site manager is responsible for safety on site. They should be knowledgeable of safety compliance and should be a registered first aider. They need to enforce safe working practices and adherence to WH&S guidelines. Daily tool box talks should be conducted to keep the trades informed on

☐ **Build Quality Management**

The site manager is responsible for the overall build quality, they should be conducting daily inspections to ensure the trades are completing their scope with the highest attention to detail. Instilling a high expectation for quality will reduce the defects at the end of the project.

☐ **Programme Management**

The Site Manager should work closely with the trades to ensure their scope of works is completed to the construction programme. If one trade is late it can have a knock on effect for follow on trades. Poor programme management could mean your project won't handover on time.

☐ **Weekly Project Control Group meetings**

For the duration of the delivery the Site Manager should be involved in the weekly PCG's to talk through the progress on site and raise any issues and what the proposed resolution is.

Handover.

So, after many months of work you have finally arrived at project handover. The following points step you through the handover process.

☐ Defects

2 weeks out from handover a defects list should be started, your designer and project manager should conduct inspections with you and identify items to complete. The goal is for the project to be handed over defect free, if there are any defects identified at handover these should be rectified in a timely manner, we recommend 2 weeks as a reasonable time to correct defects.

☐ Occupancy Certificate

Once works are complete your D&C partner will arrange for the Certifier to inspect the finished build to ensure Building Code of Australia compliance they will issue an Occupation Certificate. You can not legally occupy your new office without this certificate.

☐ Handover Letter

Once the walk-through has been completed you and your project manager will sign a handover letter when you are happy and the keys will be returned back to you.

☐ Operation + Maintenance Manual

Once all the above steps have been completed you should be provided an operation and maintenance manual for your new office. The O & M manual should consist of manuals for all equipments installed in your fit-out. Sub-contractors contact details should also be included for maintenance call out purposes.



The Actual Move.

Your D&C partner will be able to recommend a couple of move management companies to assist with the physical move. Typically this will be filing, IT equipment and personal possessions. It's advisable to get them in to provide quotes at least a month out from the relocation date. Other things to consider are listed below:

☐ Internet Connection

Orders should be placed 3 months out from the intended occupation date. The telco's are notoriously slow so ample time should be allocated.

☐ Utilities Companies

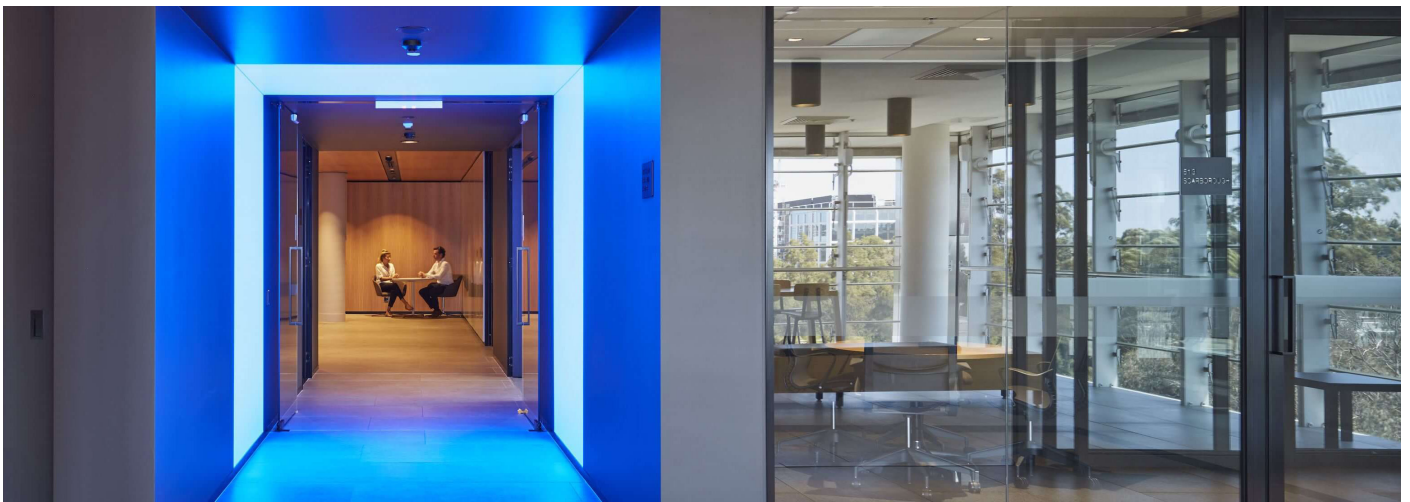
Setting up your electrical account should be done ahead of time to ensure you only start paying from when you move in

☐ Welcome Breakfast and Orientation

A welcome breakfast for the staff, its a great opportunity to give them an orientation of their new space. This is particularly useful if the new space offers new ways of working. It's good to let the designer explain how areas of the office are designed to be used and give the staff the approval to use these spaces.

☐ Enjoy your new home.

Your journey likely started a year ago, the property search and selection, the lease negotiations, the engaging of consultants and the design and build process. If you've selected the right D&C Partner this journey should have been an enjoyable and easy process. Now it's time to give yourself a pat on the back and take the glory from your company and your team.



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Have questions? Speak to
our specialist to get more
information.

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