

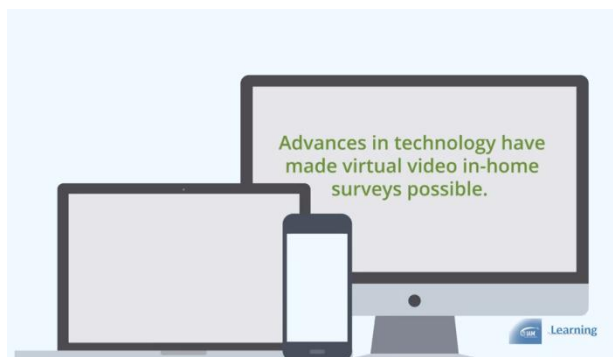
## Pre-Move Survey

The pre-move survey is not only a very important aspect of the move plan; it is a critical part of the sales process for competitive moves. A professional Moving Consultant must not only be very knowledgeable about their company and the industry but also be very skilled in sales.

Some companies that specialize in corporate or government business do not require an in-home sales process as the job has already been awarded to them. At some of these companies, the Moving Consultant role is called a Surveyor. While the survey aspect of the in-home consultation is important, we believe the term Moving Consultant more accurately describes this very important role which **incorporates** not only the physical in-home survey of the goods but also the aspects of professional consultation, **expectation-setting** and assignment of key responsibilities.

## The In-Home Survey

The in-home survey is such an important part of successful move planning that we will devote a future course just to this subject. As a Move Coordinator, you need to be aware of the key steps in the process so that you can provide the right guidance to your customer.



Advances in technology have made virtual video in-home surveys possible. The reports are that use of the video features of a smartphone in combination with custom software can produce accurate survey results. We support the adoption of such technologies to enhance efficiency, but we must not **displace** the vital consultation phase of the pre-move survey. The good news is that professionally trained moving consultants and

move coordinators are very capable of doing the consultation phase online or by telephone.

## The Process

A typical home can be surveyed in 20 to 30 minutes. The consultation part of the pre-move survey can take another 20 to 40 minutes. Of course, each home is different, so the survey time can vary.

Therefore, it is important that we question our customer carefully to **gauge** the size of the move.

Factors that may affect the volume of the shipment which may impact the amount of time required for the survey may include:

- Number of bedrooms
- Size of garage and how it is equipped
- Storage areas, attics, basements
- Artwork, fragile articles which may require specialized handling, packing or crating
- Professional equipment related to the transferee's occupation or hobby
- Additional pickup locations

## The Cube Sheet

Whether we are recording the survey inventory on a paper form, using a digital tool or conducting a virtual video survey, some form of inventory of the goods that the customer is planning to include in the shipment must be prepared.

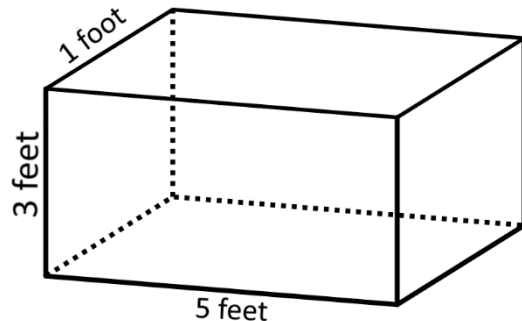
The paper form is called a cube sheet. Here is an example of a Cube Sheet.

**TABLE OF MEASUREMENTS**

Articles Loaded	Articles Unloaded	Articles Not To Be Shipped	ARTICLE	No. of Pieces	Cube	Total Cube	Articles Loaded	Articles Unloaded	Articles Not To Be Shipped	ARTICLE	No. of Pieces	Cube	Total Cube	Articles Loaded	Articles Unloaded	Articles Not To Be Shipped	ARTICLE	No. of Pieces	Cube	Total Cube
			<b>LIVING ROOM</b>							<b>BEDROOM</b>							<b>Porch &amp; Outdoor</b>			
			Bar, Portable		15					Bed Incl Sp/Matt							BBQ Grill, Small		2	
			Bench, Frsd/Piano		5					Bed Rollaway		20					BBQ Grill, Large		10	
			Bookcase		20					Bed, Single/Hollywood		40					Chairs, Aluminum		1	
			Bookshelves, Sect.		5					Bed, Std/Dbl.		60					Chairs, Metal		3	
			Cabinet, Curio		10					Bed, Queen		65					Chairs, Wood		5	
			Chair, Straight		5					Bed, King		70					Gard. Hose & Tools		10	
			Chair, Arm		10					Bed, Bunk (Set 2)		70					Glider or Settee		20	
			Chair, Rocker		12					Bookshelves, Sect.		5					Ladder, 6' Step		3	
			Chair, Occasional		15					Chair, Boudoir		10					Ladder, 8' Metal		2	
			Chair, Overstuffed		25					Chair, Str/Rocker		5					Ladder, Extension		8	
			Chest, Cedar		15					Chaise Lounge		25					Lawn Mower, Hand		5	
			Clock, Grandfather		20					Chest, Bachelor		12					Lawn Mower, Power		15	
			Day Bed		30					Chest, Cedar		15					Lawn Mower, Riding (HP)		35	
			Desk, SM/Winthrop		22					Chest, Armoire		30					Lawn Edger		3	
			Desk, Secretary		35					Desk, SM/Winthrop		22					Leaf Sweeper		5	
			Fireplace Equip.		5					Dresser/Vanity Bch		3					Outdoor Child Slide		10	
			Footstool		2					Dresser, Vanity		20					Outdoor Child Gym		20	
			Hall Tree Rack		2					Dresser, Single		30					Outdoor Dry. Racks		5	
			Hall Tree Large		12					Dresser, Double		40					Outdoor Swings		30	
			Lamp, Floor		3					Dresser, Triple		50					Picnic Table		20	
			Lamp, Pole		3					Exercise Bike		10					Picnic Bench		5	
			Magazine Rack		2					Lamp, Floor		3					Roller, Lawn		15	
			Music Cabinet		10					Night Table		5					Rug, Large		7	
			Piano, Baby Gr/Upr		70					Rug, Large or Pad		10					Rug, Small		3	
			Piano, Parlor Gr.		80					Rug, Small or Pad		3					Sand box		10	
			Piano, Spinnet/Console		60					Wardrobe, Small		20					Spreader		2	
			Radio, Table		2					Wardrobe, Large		40					Table, Small		2	
			Rec. Player, Port.		2					Waterbed		20					Table, Large		4	
			Rugs, Lg. Roll/Pad		10												Umbrella		5	
			Rugs, Sm. Roll/Pad		3					<b>NU</b>							Wheelbarrow		8	
			Sofa, Rattan/Wicker		10					Bathinette		5								
			Sofa, Sec., Per Sec.		30					Bed, Youth		30					<b>MISC.</b>			
			Sofa, Loveseat		35					Chair, Childs		3					Baby Carriage		4	
			Sofa, 3 Cushion		50					Chair, High		5					Barbells lbs.			
			Sofa, Hide, 4 Cush.		60					Chest		12					Basket (Clothes)		5	
			Stereo Component		8					Chest, Toy		5					Bicycle		5	
			Stereo, Console		15					Crib, Baby		10					Tricycle		2	
			Tables, Dropl/Occas		12					Table, Childs		5					Bowling Ball/Bag		3	
			Tables, Coffee		5					Playpen		10					Card Table		2	
			Tables, End		5					Rug, Large or Pad		10					Folding Chairs		1	
			Telephone Stand		5					Rug, Small or Pad		3					Clothes Hamper		5	
			TV, Bigscreen		40												Cot, Folding		10	
			TV, Portable		5					<b>APPLIANCES</b>							Desk, Office		10	

During the survey walk-through of the home, the Moving Consultant places a **tally** next to the article described on the cube sheet inventory noting how many of each article are to be included in the shipment. The Consultant can also make a note of articles not to be shipped.

In the sample cube sheet, the first article in the Living Room is “Bar, Portable” and the number 15 appears to the right of it which denotes the suggested volume in cubic feet. This is a cube sheet from the United States. In other parts of the world, the volume may be suggested in cubic meters.



Cubic volume is derived by multiplying the dimensions of the height, width and length. In this case  $3 \text{ ft} \times 1 \text{ ft} \times 5 \text{ ft} = 15 \text{ cubic feet}$ .

We will reserve the in-depth discussion of professional surveying skills for another course, but this is basically what the Moving Consultant will do during the survey process. By experience, she will be able to look at a Portable Bar in the home and estimate the dimensions and convert those dimensions to cubic feet or cubic meters. So, in some cases, the consultant will cross out the suggested volume and write in their own estimate based on their visual inspection and experience.



During the walk-through, the consultant will take notes of any articles that may require disassembly, special packing, crating or handling. A good Moving Consultant will also use the opportunity to relate to the prospective customer by listening carefully and gauging their reaction to particular items in the home that may be of special concern to them.

This is where the unconscious competence comes in. You cannot engage fully and listen carefully if you are worried about accurately estimating the volume of articles.

The cube sheet also provides an area for noting a tally of the various packing materials that will be required. So, as the consultant looks through the kitchen cupboard, she is tallying how many small cartons and dishpacks will be required. If any articles will require special crating, the consultant will make notes of the dimensions and requirements.

## Calculating Volume & Weight

Once the walk-through is complete, the consultant will use a calculator to total up the number of pieces and cubic volume of the shipment including the cartons that are to be packed. The estimated weight is usually derived by multiplying the cubic volume by a density factor. The averages used in the industry are between 6 to 7 pounds per cubic foot or between 95 to 110 kilograms per cubic meter in countries that use the metric system.

In the Introductory course on Transport and Forwarding, we will go into some further detail of how volumes and weights are calculated and how they affect transport and forwarding decisions. For now, let us say that our consultant has calculated a volume of 800 cubic feet for the shipment. If we multiply 800 cubic feet by a 6-pound density factor, we get 4800 pounds.

The industry is rapidly adopting the use of digital survey software which can be used on smart phones and computer tablets. These systems automate a lot of the manual calculations and may help in producing more accurate estimates.

## The Consultation

The consultant has now finished the survey walk-through noting all the articles on the cube sheet. She has taken detailed notes on the packing and special handling requirements. She has noted any access issues such as vehicle size restrictions in the residential area, elevator or loading dock reservation requirements.

She is now ready to sit down with the customer for the consultation phase of the appointment. Based on the visual inspection of the goods to be shipped, the consultant will provide a description of the packing, inventory, loading, transport and delivery processes. Many consultants will use a visual presenter in the form of a binder with pictures or a computer tablet loaded with pictures and even video sequences that depict the process.

A good consultant will engage the prospective customer and draw out any questions or concerns they may have. If this consultation is professionally done, the customer will become very comfortable with the consultant as a knowledgeable industry professional that can arrange a successful move for them.

The consultant will also use the opportunity to complete a very detailed needs analysis of the customer's requirements including scheduling and transit time requirements. A discussion about liability and insurance will be part of the consultation so that the customer's goods are properly protected during transit.

In our course on Professional Sales, we will discuss this important consultation process in much more detail.

## Professional Cooperation Guidelines

1. The Professional Cooperation Guidelines provide a very useful and detailed guide to understanding the exact requirements for a professional pre-move survey. We will provide an excerpt of this section in the text that accompanies this video. Please be sure to read it carefully and understand the very valuable function of the PCG document in providing an industry standard for how this important part of the move process should be conducted. You can find the PCG document here: <https://iamovers.mobilityex.com/#/pcguidelines>



8. The origin agent is responsible to prepare a survey report for the booker, which must address the following elements:
  - 1) Describe the type of residence (e.g., Detached / Semi-detached / Terrace / Town-house (also called Brown Stone) / Flat or Apartment / High-rise or Tower-block Apartment ...).
  - 2) Describe the suitability of vehicle approach and access (to the residence) and any exceptional requirements to overcome restrictions, including availability of parking; parking suspension requirement; need for a long (outside) carry and/or shuttle vehicle; need for an external hoist (outside elevator) or the like; steps from street level to building entrance above or below; applicable internal floor(s) above or below ground level; use of building's internal elevator (lift); need for a long corridor (internal) carry.
  - 3) Prepare a 'pre-move' inventory (survey list) of all items shown or described to the surveyor intended for the move (sometimes called a Cube Sheet).
  - 4) Note any exceptional or unusual goods including fragile, heavy and bulky items requiring extra labour or specialist handling.
  - 5) Note items which will require dismantling (and thus reassembly at delivery).
  - 6) Note if extra goods not at origin location, or new purchased goods intended for inclusion.
  - 7) Note if extra pick-up(s) from other location(s) is required.

## Summary & Conclusion

As a Move Coordinator, you may not be expected to fulfill all the functions of a Moving Consultant, yet it is important that you understand the process well so that you can provide professional guidance to your customers. The information that is gathered during the pre-move survey is not only vital for the Move Plan but also for the very success of the customer's relocation and our company's ability to deliver on our promises to the customer.

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