



CASE STUDY

**The Best-Laid Plans:
Barbara's Cross-Country Move to
Her New Retirement Home**



The Best-Laid Plans: Barbara's Cross-Country Move

When Adele Smith's phone rang one cold February morning, she had no reason to suspect anything out of the ordinary. As sales leader for the Whispering Oaks retirement community, Adele was accustomed to spending long hours making calls to prospective residents, hosting events, and leading tours of the community's buildings and grounds. After all, for many prospective residents, she was the human guide along their journey to the next phase of life.

On the line was 92-year-old Barbara. "I'd like a two-bedroom unit as soon as possible," Barbara said.

"How soon?" Adele asked.

"Well, I've sold my house. I have to turn it over to the new owners and be out of here in less than two weeks."

Two weeks? Adele thought quickly. Whispering Oaks did indeed have a unit that met Barbara's specifications—a light-filled space near the garden gazebo. "You got it," she told Barbara. "I'll get the ball rolling."

Five days later, with only a week remaining until Barbara's move, Adele gave her a call. She wanted to provide an update on Barbara's lease and see how preparations were going. "I have about 30 boxes packed so far," Barbara said.

"Sounds like you're making progress."

"I fired the movers yesterday,"

"I suppose so. By the way," Barbara added, "I fired the movers yesterday."

The Partner in Senior Moves

While Barbara was finishing packing, across the state at the Moves for Seniors head office, senior partner services manager Craig Leonard was well into a typical day. Craig has helped seniors and their families make the transition to an assisted or independent living facility. A 10-year company veteran, he had seen just about every senior living scenario there was. He considered himself a fierce advocate for his vulnerable customers.

Craig had nearly two dozen senior moves to coordinate, and he was determined to make every one as stress-free as possible. All day long, he had been going back and forth among seniors, family members, local moving companies, long-distance moving companies, retirement communities, and the Moves for Seniors operations team.

It was in the middle of all this that Craig got the call from Barbara. Over at Whispering Oaks, Adele had put them in touch.

A Life Well-Lived

Whispering Oaks is a senior living community nestled among the wineries that dot western Pennsylvania's rural Shenango Valley. Located in Hermit-



age, just north of the rolling Amish farmlands of Lawrence County, the community is about 30 minutes from the resurgent arts and culture scene in Youngstown, Ohio. In another direction, an hour's drive takes residents to the modern skyscrapers of Pittsburgh.

Barbara had visited Whispering Oaks the previous year, staying in the guest suite as she evaluated the community. She knew the area. A former Navy nurse, Barbara had set up the nursing program at Case Western Reserve University before moving to the West Coast in the 1970s to care for her mother. There, she earned a PhD while teaching at a local university.

Now, a life of service was winding down. Barbara was retired. Her mother had long since died, as had many of Barbara's friends. Her closest family lived out of state. She put her house on the market, and soon found a buyer. Fiercely independent, Barbara had every intention of managing the move herself, but quickly found the task too daunting. Even packing up the house took more effort than she anticipated—and the time was drawing near to turn over the keys.

The First Bump in the Road

Barbara had fired the movers because they insisted she unpack the boxes she had filled and pay them to repack everything. That's not unusual. Many movers don't want to take responsibility for things they didn't pack, because improper packing is the number-one reason for damage. But a senior-sensitive mover can open the boxes, add whatever packing materials are needed to stabilize the contents, then reseal them.

Moving services are a highly-regulated business, and freight moves are licensed differently from household moves. Insurance coverages vary too. According to Moves for Seniors, \$1 million in general business liability insurance is preferred and the movers should provide the retirement community's parent company with a certificate naming them as an additional insured.

Barbara had arranged for a ride to the airport on moving day. At the other end, in Pittsburgh, her

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cousin Kate would pick her up and take her to Whispering Oaks. A week before her planned departure, just after telling Adele she had fired the movers, Barbara got a call from Kate. She told Kate she was falling behind in her packing. "But," said Kate, "she had other movers lined up and was sure that they would help."

The Senior Move Challenge

Estimates. Quotes. Bookings. Service changes, schedule changes, every sort of change. With seniors, Craig knew, the situation tended to be fluid. They often found themselves overwhelmed by the many details of a move. They could be absolutely certain they had packed a certain number of boxes, for example, only to later discover they were mistaken. Or they might vow to ruthlessly purge their belongings—but then waver on moving day, when there was no more room on the truck.

If the move was small enough—say, a studio apartment's worth of items—Craig could take down a list of items over the phone. But bigger moves, like Barbara's, required someone on location to review the property. Sometimes Craig engaged a local partner for this task, working with the senior and the operations team to make it happen. Other times, he used the RoomRover™ app that Moves for Seniors developed to remotely video record the contents of the seniors' home. As Craig put it, "it's like FaceTime on steroids." With the help of a friend, a family member or just a tech-savvy senior, they would walk through the senior's home explaining to Craig what they were keeping, packing, storing, dumping, or donating.

Every move was unique. Craig had a finely-honed list of questions he'd developed to uncover Barbara's needs: Had she sold the house? Where was she staying? Did she need help downsizing? How urgent was the move? Did she need help with packing and preparation?



The RoomRover™ program remotely records items in the home using a smart phone or iPad and creates a customized estimate based on the seniors' requirements.

Based on the answers, Craig would call on the services of a senior move facilitator—a professional to manage downsizing. But in Barbara's case, there was no time to bring in a local facilitator. Craig and his team would handle it all and find the optimal intersection between budget and need.

Mobilizing for Action

By the time she called him, Barbara "was frantic," said Craig. "She had been packing her personal items for a couple of months, but had no family or friends out there to help her. And Barbara didn't trust strangers, since her home had been burglarized several times."

As with any major project, advance notice is key to ensuring the moving process runs smoothly. But extraordinary circumstances require extraordinary effort. "We immediately contacted our local move partner, Big Deahl's Movers, to set up an onsite video," Craig said. With the weekend intervening, Greg Fluker—Big Deahl's owner—arrived several days later to walk through the house with Barbara. Across the country, Craig and his team watched online.

Afterward, Greg sent Craig a flat-rate estimate for packing, loading, unloading, vehicle towing, logistics, and timing. Barbara reviewed the estimate and accepted it.

Greg's team was scheduled to arrive the next day—two days before Barbara's expected departure. Everything was in place. Only one step remained: payment, so that the local movers could proceed.



The Run-Up to Departure

Barbara didn't use credit or debit cards. As a result, to compensate the movers, Barbara needed to get a wire transfer completed. Moves for Seniors had already sent the necessary information to Barbara's bank.

Barbara had thought the bank would send a representative to the house. To double-check, Craig reached out again to Barbara's bank. After multiple calls and messages, Craig finally got through. His information was wrong, the representative told Craig. Barbara had to complete the transaction in person.

A nasty surprise awaited Barbara when she slipped behind the wheel. The battery was dead.

But a nasty surprise awaited Barbara when she slipped behind the wheel. Her car wouldn't start. The battery was dead.

Matters grew worse the next day. When the movers arrived as planned, they discovered two things. First, no payment was available. Second, the driveway was inaccessible—Barbara's car was blocking it.

Frustrated, Barbara burst into tears. The Moves for Seniors team comforted her. "Don't worry about a thing," Craig told her. "We'll get your car fixed, then figure out a time that the movers can take a break. Then you can lock up the house and head for the bank."



Then Craig got on the phone with Greg. "Please just start packing," Craig said. "We'll take care of the rest." As soon as he hung up, Craig called AAA. He arranged for them to come to Barbara's house and replace the battery in her car.

By midday, the car was once again in working order. The movers paused for lunch and off Barbara went.

The wire transfer wouldn't post to the movers' account until the next day. But Greg and his team continued packing well into the evening, confident

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that Moves for Seniors would make sure his crew would be compensated for their efforts.

At last the house's contents were ready to go. The movers packed and loaded roughly 5,000 pounds of property into their 26-foot truck. Once the truck was completely full, they connected the tow dolly, loaded Barbara's car, and secured it. Then Greg and his team climbed on board and pulled out for the 2,400-mile journey east.

The Wrap-Up

After two nights at an airport hotel, Barbara boarded a flight to Pittsburgh. There, Kate picked her up and took her to Whispering Oaks. Adele and the community staff "were delightful," Kate said, "very welcoming. They offered anything they could."

The movers arrived two days later. There they were met with another surprise: Barbara was adamant that the truck's entire contents be unloaded into her new apartment, where she would unpack everything herself. Greg "was wonderful," Kate said. Realizing that Barbara would not be persuaded, and not wanting to distress her, Greg and his team moved in as much property as possible. "In the spare room, boxes were stacked to the ceiling," Kate recalled. Meanwhile, Moves for Seniors secured a storage unit at a facility two miles away, where the movers took Barbara's remaining belongings.

There was also the matter of a filing cabinet. Barbara had agreed to leave the cabinet behind, but changed her mind upon arriving at Whispering Oaks. Craig contacted the new owner of Barbara's former house and persuaded him to set aside the filing cabinet's contents. Meanwhile, Kate arranged for a friend in the area to pick up the papers along with Barbara's mail. The friend brought the items east with her while traveling for business, and soon Barbara had her documents again.



Today, Barbara has settled into community life. She's made many new friends, and enjoys going out with them to dinner or to the movies. Her strength is back, and her social calendar is full.

"I don't know how Moves for Seniors did it," Adele says of Barbara's move. "Three days! Craig kept me in the loop on their progress the entire time. They took the time to answer all her questions." Moves for Seniors, continues Adele, was "amazing. So compassionate. So caring. They really did gear themselves toward the senior."

Putting It All Together

"There's moving," Craig said, "and then there's senior moving."

Completing Barbara's cross-country move was very much a team effort. The process Adele set in motion led to Moves for Seniors establishing a command post for coordinating all the moving parts and resolving situations as they came up. Throughout the move, "Craig was pretty incredible in terms of keeping in touch with me," Kate said. "And the movers were just wonderful." Meanwhile, according to Craig, Kate was "the voice of reason" for Barbara. And the retirement community professionals "were amazing," Kate said, in helping Barbara to settle in.



Moving is a major life event for almost anyone. For a senior, however, it's a multi-stage process that requires long-term adjustment. Realizing this, leading retirement communities are making senior moving specialists like Moves for Seniors an integrated part of delivering a high-touch, high-end amenity experience.

Moves for Seniors is a nationwide team of professionals dedicated to the needs of the senior housing industry and the residents moving into retirement communities. They are the control center for a network of licensed and credentialed move professionals who are fully insured and trained to meet all the needs related to local and long-distance senior moves.

In Good Hands

Firms that specialize in senior moving don't merely handle logistics. They customize their services to everything each senior needs to complete the transition to their new home. The goal is to provide the senior with a personalized, full-service moving experience—all carried out with calm, competence, and care.

Relocation Stress Syndrome

Relocation Stress Syndrome (also known as Transfer Trauma) is a formal diagnosis seniors may face when relocating from one place to another. The syndrome is most often seen among seniors relocating to environments with different levels of care.

The risk of Relocation Stress Syndrome increases when there is:

- Little or no time to prepare for a move
- A lack of predictability about the new environment
- Little or no time between notification of the move and the move itself

The best way to combat Relocation Stress Syndrome is by allowing seniors enough time to come to terms with a relocation. If possible, work hand-in-hand with the aging family member well in advance of the move so they can be involved in the planning and decision-making. Feeling like they are in control of the relocation process will help seniors with the adjustment.

The general moving industry is not aware of—nor has deployed the standard operating procedures necessary to deal with—this real-life condition. This hampers many decisions to move into senior housing communities.

Full Service Senior Downsizing Solutions

Make Moves for Seniors Your One Source for Stress-Free Transitions

Moves for Seniors will guide you and your family through the downsizing process. From a comprehensive assessment of needs to managing all logistics associated with your move, we will take care of it all.

Since 2007, Moves for Seniors has been dedicated to serving the moving needs of seniors nationwide. We coordinate every part of your move including packing, organizing, relocating heirlooms to family and taking away items you no longer want or need with simple and affordable pricing options.

Our Services Include:

- Free consultation and coordination
- Local and long-distance moves
- Specialty shipping services for precious family items
- Multi-destination distribution
- Donations, storage, and junk removal
- Packing, space planning and organization
- Estate distribution
- Clean out services

