Microsoft: CoreNet 2010
London Summit

Doug Lowrie
Regional Workplace Strategist
Microsoft Real Estate and Facilities
Microsoft Business Divisions

Revenue $14.7B
Revenue $18.8B
Revenue $7.7B
Revenue $3.1B
Revenue $14.1B
EMEA RE&F Overview

Regional Directors

Americas
- New

EMEA
- Susan Wagner

Asia
- Mike DeMuro

Puget Sound
- Jay Pittenger

Center of Excellence

Program Team
- ROB management
- Workplace strategy
- Environmental
- Capital planning
- PER Governance

Business Manager
- Vendor management
- Communications
- Data governance
- Controls & compliance
- Industry relations
- Health and Safety
- FM tendering
- Project Management
- Real Estate transactions

FM and Operations

Workplace Strategy

Regional Comms

Area Portfolio Manager

Typical sub-structure

Facility Manager
Who We Are

Microsoft is a company that exists on innovation. The better our ideas, the better we innovate for our customers and the better we do as a business. Our campuses and workspaces are the birthplaces for our ideas. They’re the incubators for the great thinking and the amazing innovation our people do every single day.

By surrounding our people with great environments, we can help them do their best work.
Evolution of **Workplace** at Microsoft


- **Bill’s Office**
- **Corridors of Offices**
- **Workplace Research**
- **Workplace Advantage Program Developed**
- **Schiphol (SMSG)**
  - New buildings with full Free address for employees, Combining place, people & technology
- **Studios West (Dev)**
  - New buildings with atria, collaborative space and a mix of open & closed work environments

**Redmond Relocation**
Microsoft relocates headquarters to Redmond, WA, right before going public
Workplace Advantage
Workplace Advantage

WPA
A Microsoft Real Estate & Facilities (RE&F) program designed to identify and meet the unique needs of Microsoft’s diverse businesses through the provision of appropriately designed and equipped work environments.

WPA is…
• about empowering each business to make an informed decision about their workplace
• about supporting innovation and productivity for employees and their businesses through the investment in workplace solutions that match business objectives

WPA is not…
• about forcing a single solution on all businesses
• about taking away private offices or about desk sharing, though both are options within the WPA umbrella
Workplace Advantage Principles

**Goals:**
- support businesses in making well-informed and fiscally-sound real estate decisions
- facilitate collaboration among employees, and between employees and customers
- enable team building and foster community
- align the design and function of the workplace to business drivers and processes
- provide a pleasant work experience
- support creativity and innovation
- provide employees with greater flexibility

- Align **workplace designs** with business unit goals to enhance innovation and productivity
- Recognize the need for more and different types of active **collaboration spaces**, both formal and informal
- Give attention to **human factors** like access to daylight and nature, **sustainability** and personal control
- Support **group identity and community** in the workplace, including showcasing MS technologies
More variety and choices of space

- **Routine dedicated workspaces**
- **Individual privacy spaces**
- **Team clusters**
- **Hub spaces**
- **Flex Privacy rooms**
- **Ad hoc meeting areas**
- **Formal conference rooms**
Collaboration Technology

Technology drives a multidimensional approach

Place for community

Enhanced support for teams

Empowerment for individuals
WPA Matters

**Non-WPA performance scores***:

<table>
<thead>
<tr>
<th>Category</th>
<th>Overall Satisfaction</th>
<th>Productivity</th>
<th>Informal Collaboration</th>
<th>Formal Collaboration</th>
<th>Privacy/Concentration</th>
<th>Expression</th>
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<tr>
<td>OVERALL SATISFACTION</td>
<td>64%</td>
<td>60%</td>
<td>61%</td>
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<td>61%</td>
<td>72%</td>
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<td>54%</td>
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<tr>
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<td>57%</td>
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<tr>
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<td>54%</td>
<td>80%</td>
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<tr>
<td>MEET &amp; INTERACT WITH COLLEAGUES</td>
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<td>54%</td>
<td>79%</td>
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<tr>
<td>Sense of community</td>
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<td>72%</td>
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<td>52%</td>
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<tr>
<td>Individual productivity</td>
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<td>FOCUS SPACES</td>
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<td>54%</td>
<td>71%</td>
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<td></td>
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<td>PRIVATE CONVO</td>
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<td>ABILITY TO CONCENTRATE</td>
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<td>EXPRESSION</td>
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**WPA performance scores***:

<table>
<thead>
<tr>
<th>Category</th>
<th>Overall Satisfaction</th>
<th>Productivity</th>
<th>Informal Collaboration</th>
<th>Formal Collaboration</th>
<th>Privacy/Concentration</th>
<th>Expression</th>
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</thead>
<tbody>
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<td>64%</td>
<td>76%</td>
<td>65%</td>
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<tr>
<td>Helps job satisfaction</td>
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<td>64%</td>
<td>79%</td>
<td>65%</td>
<td>62%</td>
<td>86%</td>
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<tr>
<td>MEET &amp; INTERACT WITH COLLEAGUES</td>
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<td>64%</td>
<td>79%</td>
<td>65%</td>
<td>62%</td>
<td>86%</td>
</tr>
<tr>
<td>Sense of community</td>
<td>67%</td>
<td>80%</td>
<td>79%</td>
<td>65%</td>
<td>62%</td>
<td>86%</td>
</tr>
</tbody>
</table>

* Data obtained through Workplace Performance Survey and Post Occupancy Evaluations.
2009 / 2010 Research
WPA Program is based on workplace research

**Surveys**
- collect data about employee work patterns, space functionality, and the importance and performance of various workplace characteristics

**Observations**
- gather quantitative and qualitative information about mobility patterns, general space use, and ways of working

**Focus groups**
- discuss work styles, current workplace performance, and future goals with employees

**Academic studies**
- conduct independent academic research

**Industry networking and consortia**
- team with industry partners to share knowledge and experience

**Pilots**
- conduct experimental trial prior to changes to guidelines

**Modified guideline implementations**
- test small changes to guidelines in routine projects

**Mock-ups**
- test and study through model

**Lab-based tests**
- create living work lab, where environment can be changed and adapted by researchers based on real-time feedback

**Revised guidelines**
- update and set standards that inform design, programming, and use of workspace

**Best practices**
- track lessons learned from previous projects
Goals of 2009 Global Workplace Research

- Update work completed in 2004/2006
- Verify workplace trends at Microsoft & externally
- Understand building performances
- Validate WPA impact
- Solicit feedback from Field/BD’s
- Use data to develop workspace strategy & guidelines
## Research Summary - What we did

<table>
<thead>
<tr>
<th>Study / Targeted insight</th>
<th>Asia</th>
<th>Americas</th>
<th>EMEA</th>
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<td>Time Utilization Study</td>
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<tr>
<td>Targeted insight</td>
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<tr>
<td>Workplace Performance</td>
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<td>Survey</td>
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<td>Focus Group</td>
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<td>Interviews</td>
<td></td>
<td></td>
<td></td>
</tr>
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<td>Dates Conducted</td>
<td>Dec 08 - Jan 09</td>
<td>Jan - April 09</td>
<td>Mar - June 09</td>
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<td>Participants</td>
<td>4,500 (29%)</td>
<td>2,206 (24%)</td>
<td>6,599 (25%)</td>
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<td>8 key sites</td>
<td>10 LT</td>
<td>4 key sites</td>
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<tr>
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<td>10 LT</td>
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<td>Business Groups</td>
<td>SMSG, Dev</td>
<td>SMSG, Dev</td>
<td>SMSG, Dev</td>
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</tbody>
</table>
Global Sales Design Guidelines

Objectives

• Reduce space and operational costs by using space efficiently

• Align planning metrics, terminology, and best-practices globally, based on research

• Avoid reinventing design for every project by providing consistent guidance on how the workplace “kit-of-parts” goes together

Approach

• Base Guidelines on WPA Principles

• Analysis of existing guidelines, space provisions, and best-practices by region

• Development of content and translation to web site

Outcomes

• New Global Sales Guidelines (GSG) site launched
**SMSG Design Guidelines 2010**

### Work styles

<table>
<thead>
<tr>
<th>Work style</th>
<th>Definition</th>
<th>Anchor space</th>
</tr>
</thead>
<tbody>
<tr>
<td>Work style A</td>
<td>Out of the office &gt;67%</td>
<td>Unassigned desk allocated at a 5:1 ratio</td>
</tr>
<tr>
<td>Work style B</td>
<td>Out of the office &gt;33%</td>
<td>Unassigned desk allocated at a 3:1 ratio</td>
</tr>
<tr>
<td>Work style C</td>
<td>Regularly in the office, but away from a desk &gt;50%</td>
<td>Unassigned desk allocated at a 2:1 ratio</td>
</tr>
<tr>
<td>Work style D</td>
<td>Works at a desk in the office &gt;50%</td>
<td>Workstation assigned 1:1</td>
</tr>
<tr>
<td>Work style M</td>
<td>Often away from a desk, but frequently has private conversations</td>
<td>Unassigned workstation + a privacy room allocated at a 2:1 ratio</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Work styles</th>
<th>Previous Average Occupancy M2/Head</th>
<th>Impact with 2010 Guideline M2/Head</th>
</tr>
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<tbody>
<tr>
<td></td>
<td>ASIA</td>
<td>EMEA</td>
</tr>
<tr>
<td>Small Sites</td>
<td>18</td>
<td>18</td>
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<tr>
<td>Medium Sites</td>
<td>17</td>
<td>17</td>
</tr>
<tr>
<td>Large Sites</td>
<td>16</td>
<td>16</td>
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</tbody>
</table>

### Density Effect

### Space Types

- Individual Space: 31% (2010 Guideline 18%)
- Open Collaborative Space: 24% (2010 Guideline 35%)
- Misc Support Space: 13% (2010 Guideline 15%)
- Customer Space: 27-32% (2010 Guideline 27-31%)

### Space Zones

- Improve zoning and neighborhoods to improve formal & serendipitous collaboration opportunities
- Provide more choice and flexibility in where and how employees work
- Use space more efficiently by reducing unused individual work areas
## 5 Work Styles

**Very high external mobility**
- **Definition:** Out of office >67%
- **Percentage of FTEs:** 35%
- **Ideal sharing ratio:** 5:1
- **Average work pattern:**
  - My desk: 10%
  - Another desk: 5%
  - Meeting space: 53%
  - Other bldg: 31%
  - Home: 1%

**High external mobility**
- **Definition:** Out of office 33-67%
- **Percentage of FTEs:** 12%
- **Ideal sharing ratio:** 3:1
- **Average work pattern:**
  - My desk: 31%
  - Another desk: 3%
  - Meeting space: 11%
  - Other bldg: 45%
  - Home: 9%

**High internal mobility**
- **Definition:** In the office >67%, at desk <50%
- **Percentage of FTEs:** 16%
- **Ideal sharing ratio:** 2:1
- **Average work pattern:**
  - My desk: 36%
  - Another desk: 5%
  - Meeting space: 23%
  - Other bldg: 15%
  - Home: 21%

**Non-mobile collaborative**
- **Definition:** At desk >50%, collaborate >15%
- **Percentage of FTEs:** 25%
- **Ideal sharing ratio:** 1:1
- **Average work pattern:**
  - My desk: 70%
  - Another desk: 4%
  - Meeting space: 12%
  - Other bldg: 6%
  - Home: 10%

**Manager**
- **Mobile and collaborative**
- **Percentage of FTEs:** 13%
- **Ideal sharing ratio:** 2:1
- **Average work pattern:**
  - My desk: 45%
  - Another desk: 4%
  - Meeting space: 16%
  - Other bldg: 18%
  - Home: 17%
Typical Program Process

Global Workplace Strategies
Owns toolkit, provides training, and gathers project feedback

Project Owner

Regional Workplace Strategist

APM/FM

PM

Inputs local information into the workplace wizard to Assessment Space Needs

WpW PROGRAM

Project Information
- Welcome to Workplace Wizard
- Project Settings

Population Input & Analysis
- Headcount Assumption
- Population Analysis
- Workplace Survey
- Job Role Mapping

Work Style Assignment
- Work Styles

Space Programming
- Back Office Spaces
- Customer Facing Spaces
- Auxiliary/Support Spaces
- Project Specific Spaces

Reporting
- Workplace Package

PROJECT TEAM

PM

Client stakeholders

APM/FM
Client leadership
Client staff

Packages Guidelines documents and provides Space Planning Program of current and future growth based on headcount & mobility assessment
3 ways to develop WpW program

The WPW offers three ways to develop a program, depending on the phase of the project, the level of information currently available, and the level of accuracy desired:

1. **HEADCOUNT ASSUMPTION**
   - Quick estimate
   - Requires you to input projected headcount
   - Uses regional average to estimate work style breakdown
   - Allows you to pick a low, medium or high level of mobility relative to the average

2. **MAP JOB TITLES**
   - Moderately accurate
   - Takes job titles for an office you select or from a list you import
   - Maps job titles to work styles based on regional data
   - May require you to fill in some blanks

3. **WORK STYLE SURVEY**
   - Highly accurate
   - Asks employees how they work through an automated survey
   - Uses aliases associated with a selected building or on a list you import
   - May require you to fill in some blanks
## Project Summary Report

**Report generated for a review by: Feb 21, 2019 06:01 PM**

### Project Details
- **Project Name:** Sample Program
- **Region:** American LatAm & Asia
- **Project Type:** Reconfiguration
- **Business Unit:** S4SG
- **Group Type:** Sales/Marketing
- **Facility Scale:** Large

### Work Setting: Individual

<table>
<thead>
<tr>
<th>Setting</th>
<th>Sharing Ratio</th>
<th>Size (SF)</th>
<th>Quantity</th>
<th>Total Area (SF)</th>
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<tbody>
<tr>
<td>Automated Workstation</td>
<td>1</td>
<td>42</td>
<td>221</td>
<td>2259</td>
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<tr>
<td>Private Office</td>
<td>1</td>
<td>63</td>
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<td>63</td>
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<td>Quiet Workstation</td>
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<td>Unassigned Workstation</td>
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<td>35</td>
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**SubTotal (SF):** 602

### Work Setting: Collaborative

<table>
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<td>Conference Room - Large</td>
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<td>460</td>
<td>2</td>
<td>920</td>
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<td>Conference Room - Small</td>
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<td>150</td>
<td>14</td>
<td>2040</td>
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<tr>
<td>Conference Room - Midsize</td>
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<td>150</td>
<td>9</td>
<td>1350</td>
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<td>Furnace Room</td>
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<tr>
<td>Conference Room - Midsize</td>
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**SubTotal (SF):** 775

### Customer Setting

<table>
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<tr>
<td>Conference Room, CTR</td>
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<tr>
<td>Workspace</td>
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**SubTotal (SF):** 850

### Space Forecasts

**Workstyles Summary**

<table>
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<th>Annual Growth Rate (FY02, FY12, FY22, FY32, FY42, FY52)</th>
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<td>Workstation</td>
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<td>Full</td>
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<td>Customer</td>
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<td>Work Styles</td>
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**Space Metrics**

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<th>Annual Growth Rate (FY02, FY12, FY22, FY32, FY42, FY52)</th>
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<td>Full</td>
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<td>Collaboration</td>
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<tr>
<td>Customer</td>
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<tr>
<td>Work Styles</td>
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**Total Space:** 124/14

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**Full Planning Program**

- Individual Work Settings
- Collaboration Space
- Customer Space
- Work Styles
- Space Forecast
Appendix:
Change Management
Change Management Is…

...a process of transforming peoples’ mindset and behavior in parallel with planned changes to their environment, that are in turn meant to support their business. It helps them adjust to and get the full benefits from those changes.

It is ---

- Participative: People need to be actively involved in their own transformation for it to be effective (including leaders)
- Incremental: People change in phases, not overnight
- Responsive: Worries, doubts, and desires need to be explicitly addressed, but they won’t become apparent until the process begins

Change management is not…

- Just a communication plan: Coherent communication is critical, but change management is more than just informing people
Benefits of positive Change Management

- Helps employees **quickly adapt to changes** and see benefits
- Maximize **understanding, buy-in, and excitement** around new workplace concepts within the business
- Make the process **stimulating and fun, but undisruptive**
- Minimize **time and cost commitments** required of RE&F/Client to implement
The change management framework --

-- is designed to follow the typical phases of change:

<table>
<thead>
<tr>
<th>STABILITY</th>
<th>DOUBT</th>
<th>HOPE</th>
<th>CAPABILITY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Denial</td>
<td>Resistance</td>
<td>Inquiry</td>
<td>Enthusiasm</td>
</tr>
<tr>
<td>Avoidance</td>
<td>Anxiety</td>
<td>Exploration</td>
<td>Confidence</td>
</tr>
<tr>
<td>Ignoring</td>
<td>Frustration</td>
<td>Clarity &amp; Direction</td>
<td>Satisfaction</td>
</tr>
</tbody>
</table>

1. Assess work styles
   - Mobility Identification Survey
   - Manager Session

2. Push leadership ahead of the curve
   - Leader Session

3. Explain changes to all staff
   - Town Hall Meeting

4. Solicit staff input
   - YourPlace Workgroup* Meeting 1
   - New Office Website
   - General communication to staff

5. Prepare staff to work in the new space
   - YourPlace Workgroup Meeting 2
   - Website updates
   - General communication to staff

6. Prepare staff to move
   - YourPlace Workgroup Meeting 3
   - Website updates
   - General communication to staff

7. Gather feedback
   - Post-Move Survey

*YourPlace Workgroup refers to employee “committee”
Change Management Package

- The Change Management Package provides everything a planning team needs to manage change successfully in Microsoft workplaces.
- Minimal editing is required to localize content, but high-level guidance is also given if the local team wants to create unique material to address unique issues.

What is included in the guide:

- Introduction to change management
- Schedule that you can build into your own project schedule
- Tools and activities that can be tailored to site
- Roles and responsibilities
- Website template
- Move Guide
Package structure

Change Management 2.0

Introduction to the Guide

Leadership Session
- Introduction
- Speaker Guide
- Tools/templates
- Communications

Town Hall Session
- Introduction
- Speaker Guide
- Tools/templates
- Communications

Workplace Input Team (WIT)
- Introduction
- Speaker Guide
- Tools/Templates
- Communications

Communications
- (All staff)
  - Email bulletin #1
  - Email bulletin #2
  - Email bulletin #3
  - Email bulletin #4
  - Email bulletin #5
  - Email bulletin #6

Support Materials
- Website Template
- Move In Guide for Employees
- Space Use Signage
- Employee Mobility Guide
Summary of 2009 Research Findings

• Utilization of individual workspace is low, across the board, more so in SMSG / Channel sites.
• Collaboration is under-supported in older sites.
• The consistently lowest-ranked topic in SMSG sites is ‘showcasing of MS brand and technologies’ (all regions).
• EMEA and Americas targeted research had almost same results for utilization rates.
• WPA Sites out-perform legacy sites.
### Work Patterns Changing Globally

Average work patterns across regions 2009 v 2004

#### SMSG Field Sites Only

<table>
<thead>
<tr>
<th>Region</th>
<th>2009</th>
<th>2004</th>
</tr>
</thead>
<tbody>
<tr>
<td>ASIA</td>
<td>48%</td>
<td>57%</td>
</tr>
<tr>
<td>Americas</td>
<td>36%</td>
<td>62%</td>
</tr>
<tr>
<td>EMEA</td>
<td>38%</td>
<td>62%</td>
</tr>
</tbody>
</table>

#### All sites surveyed

<table>
<thead>
<tr>
<th>Region</th>
<th>2009</th>
<th>2004</th>
</tr>
</thead>
<tbody>
<tr>
<td>ASIA</td>
<td>56%</td>
<td>57%</td>
</tr>
<tr>
<td>Americas</td>
<td>40%</td>
<td>62%</td>
</tr>
<tr>
<td>EMEA</td>
<td>46%</td>
<td>62%</td>
</tr>
<tr>
<td>Puget Sound</td>
<td>55%</td>
<td>68%</td>
</tr>
</tbody>
</table>

Legend:
- **Light green**: At an individual desk
- **Orange**: In another building
- **Dark red**: At home
- **Black**: Elsewhere

*Microsoft Confidential*
## Findings – SMSG (Field Sales Sites)

### Major findings

<table>
<thead>
<tr>
<th>Use of Space is inefficient</th>
<th>Collaboration is under-supported</th>
<th>Offices lack brand expression</th>
</tr>
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<tbody>
<tr>
<td>• Assigned and unassigned individual workspaces are extremely underutilized</td>
<td>• Flexible teaming and ad hoc interaction within functional areas is critical to the business, but not well supported</td>
<td>• Current environments contradict MS values and brand</td>
</tr>
</tbody>
</table>

### Major recommendations

<table>
<thead>
<tr>
<th>Expand mobility</th>
<th>Increase collaborative support</th>
<th>Express Microsoft brand</th>
</tr>
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<tr>
<td>• Reduce overall space per person by increasing desk sharing ratios</td>
<td>• Increase the current ratio of collaborative space.</td>
<td>• Use workplace flexibility and mobility to express brand &amp; showcase technology</td>
</tr>
<tr>
<td>• Identify a broader group of people that are mobile based on actual work patterns rather than just on titles</td>
<td>• Create neighborhoods and hubs that stimulate and enhance interaction</td>
<td></td>
</tr>
</tbody>
</table>