



A COVID-19 Virtual Ideation Experience

Space Utilization & Metrics Team Number: 21

Develop key forecasts and recommendations for corporate real estate professionals as they address how the pandemic will impact space utilization and metrics going forward.



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Our Research



Our Diverse Team's Experience and Expertise



Continued Webinars by Recognized Leaders in our Industry



Interviews with our Network of CRE's and Industry Leaders



CoreNet Global Ongoing webinars



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Influencers

*The culture of a company may change to be more human centric due to the expanded ecosystem of the workplace, but some will remain space centric. **Decentralized or Centralized, that is the question.***



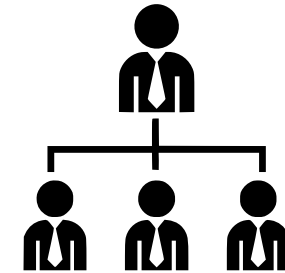
Culture

Foundational in Decision-Making



Cost of Real Estate

SFΔ, Rental Rates, TI Costs



Organizational Structure

Centralized vs. Decentralized



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Timing of the Change

Considerations



Short Term

Prepare the Workplace for a Safe Return with Minimal Adjustments Conforming to Governmental & Health Requirements

Mid-Term

Rethink the Ecosystem of Workplace Choice & Metrics Needed for Success

Long Term

Implement Protocols that Enhance the Experience & Productivity of Employees

Cost of Real Estate & Design

- Costs will increase to provide the enhancements required for a safe and productive workplace
 - Enhanced building security
 - Hands free/automated equipment
 - Changes to building systems (HVAC and water treatment)
 - Increased cleaning protocols

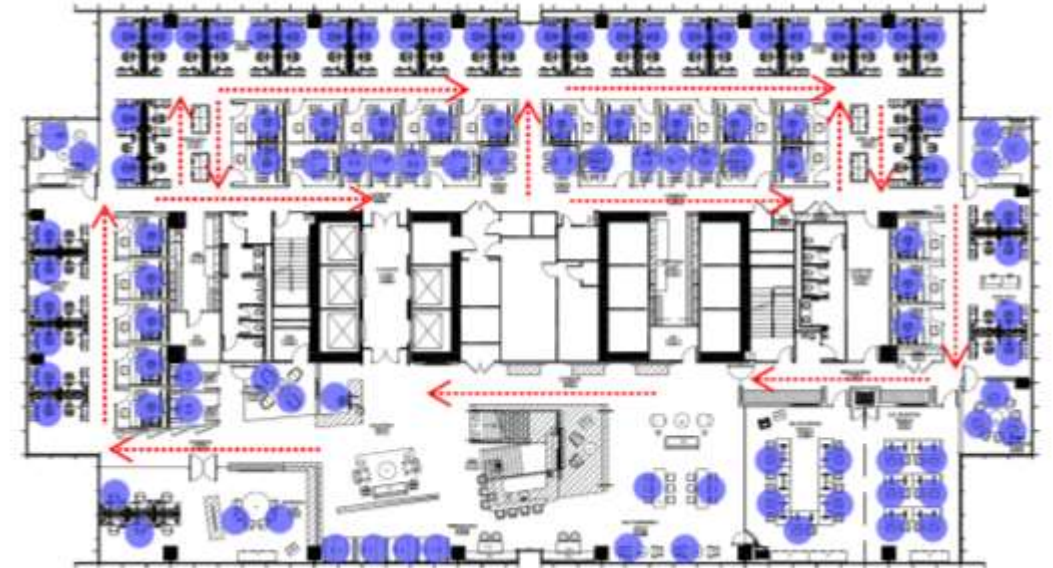


The WFH and Flex Work Factor Reimagining the Workplace

- Workplace Strategy will need to inform the right balance
- More choice in where we can be most productive...home, office, 3rd place, flex space
- No “one size fits all”
- Flex Office will evolve to include safe practices to overcome density issues



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Technology Considerations

- Security
 - Audit existing access control systems for additional features (Analytics for crowding, population control, and virtual barriers)
 - Enhance lobby safety/security protocols
- Audio Visual - Conference Rooms
 - New apps accommodating increased room bookings, fewer seats, & occupancy sensors to monitor traffic
- IT Infrastructure
 - Increase Help Desks services for Remote Workers
 - Expanding Wi-Fi/Cellular Coverage to support nomadic workforce
- Invasion of privacy – Personal data sharing for marketing purposes



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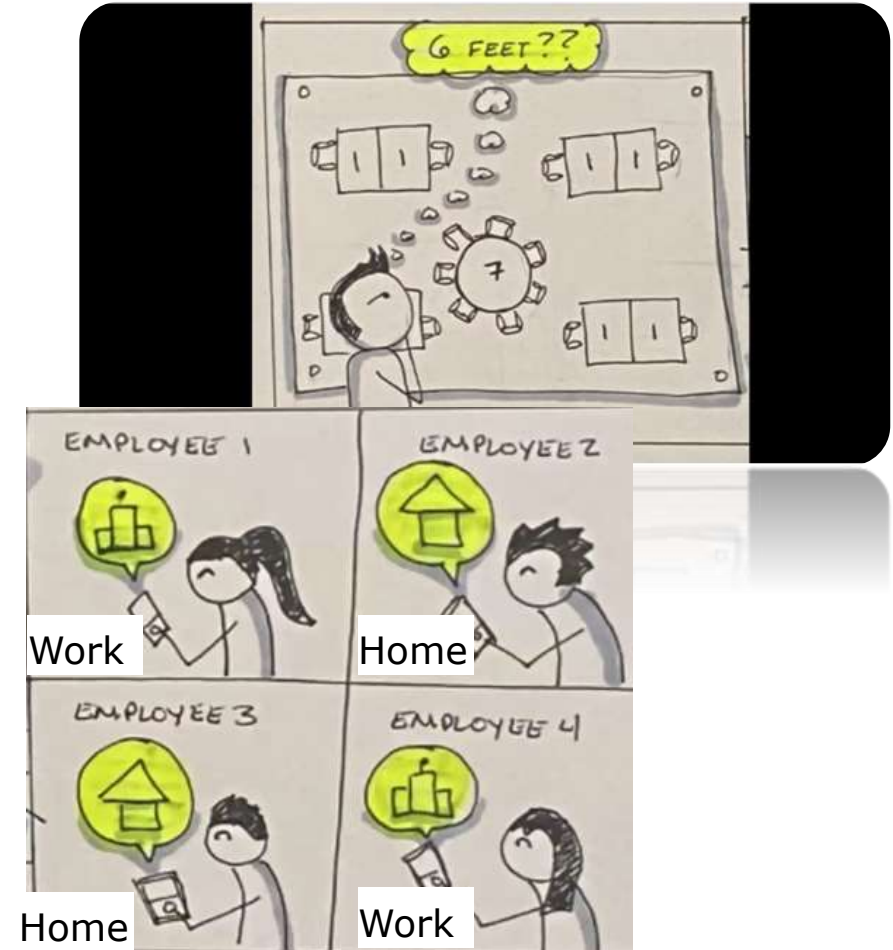




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Space Requirements/Metrics

- Short term - major clients staying the same. Wisdom to evaluate the new “normal”
- Long term - yet to be determined based on new Workplace Strategies
- Metrics - Assumed 1:1 desk:person strategy is no longer standard practice
- Workplace and it’s value to the company shifting
- How can we make X number of SF perform as effectively as possible for the most amount of people?

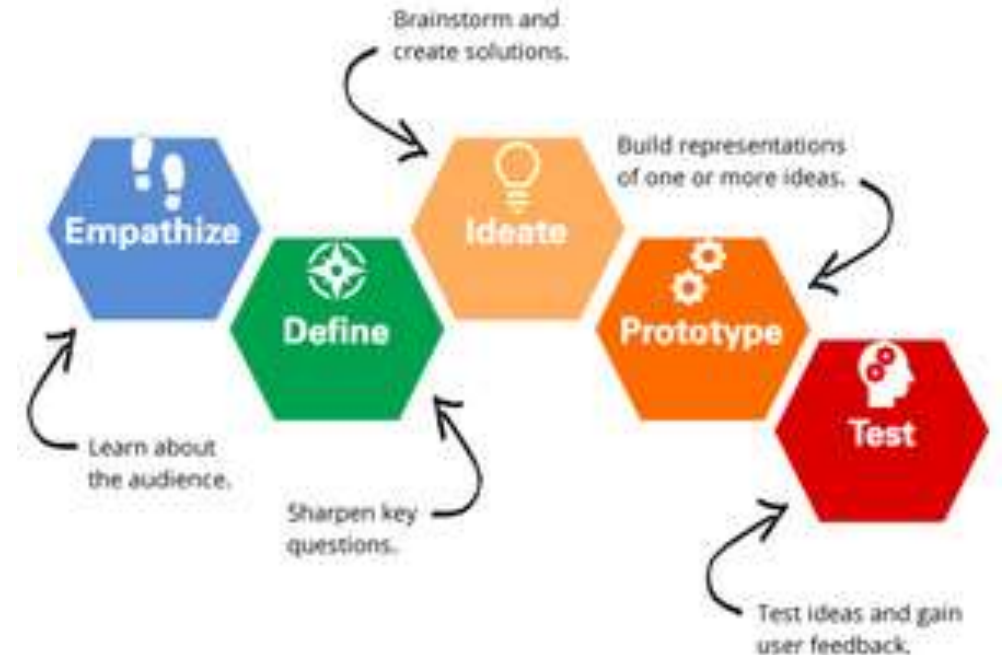


Ideas on Measuring the Human Centric Experience

- Measure of Productivity
- Wellness as a major influencer
- Collaborative environments will still be required
- Choice will be a benefit for attract/retain issues
- Change Management is critical



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Final Recommendations/ Conclusions

- Things are changing and evolving every week
- Utilize your network of experts to inform your decisions
- Workplace Strategy will be key to customizing your needed solution
- It's likely that space/person will not change greatly, but how the space is utilized will
- Real Estate Strategy will need more consideration on flexibility
- Managed/Serviced Space (Co-Working) office will not be going away
- Construction Costs will need more management/scrutiny to allow for appropriate decision making on spend
- The cost associated with creating WFH environments should be comparable to the costs of professional experience at the office.
- Follow your guiding principles and culture to make grounded decisions

