GUIDING PRINCIPLES
For The Implementation Of Your Workplace Strategy

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Welcome!

Learning Objectives:

• How to define and develop the Planning and Data Management principles that can be used throughout the implementation of your Workplace Strategy

• How to link the ‘tactical to the strategic’ in both Planning and Data Management in order to provide a measurable foundation and define the appropriate metrics

• How to develop a simple method to score your current situation and allow for identification of improvements
INTRODUCTION
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Managing Principal, On-Site Services
HOK – Ottawa

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Vice President
Senior Specialist, On-Site Services
HOK – Ottawa

60 million
Amount of space, in square feet, managed for clients by space management team

270,000
Number of employees in space managed by on-site services team

95%
Level of space and occupancy data accuracy provided for a global technology company

3,780
Number of as-built drawings

431,000
Number of unique spaces
60%
Our Observation...

60-70% of a portfolio is not ready to implement a new Workplace strategy – it needs some sort of “trigger” to occur
What Can STOP a Workplace Strategy Implementation
Business headcount change impacting future plan
Regional business strategy being developed – cannot act yet
Business case missing – cost too high, payback too long
Site to be vacated shortly
“I didn’t know we had a building there”
“What do you mean we don’t have a drawing of that space?”
“What is the headcount?”
“The floor doesn’t look like that!”
Keeping pace with the speed of change

- Workforce Transition every 5 years
- Workplace Change every 10 years
- Business Change every 3 years
- Building Revitalization every 40 years
- Technology Change every 18 months
Continuing the Portfolio Statistics

Developing Trigger…  60% – 70%
Further Study…        10% – 20%
Not Required…         10% – 15%
Project Underway…     5%
If you renovate 5% of the portfolio every year, it will take you 20 years to implement a new workplace strategy across your portfolio.
Case Study

One organization:
Started WP Strategy in 2009
Approved 2012
Goal: 5% of Portfolio / year
Actual: 1% / year

Five years in: 5% of portfolio fitted to WP Strategy

They are now onto the NEXT iteration of the WP
Audience Question?

How many people know of a firm that has implemented their workplace strategy across their entire portfolio?

Definition of a Portfolio
5 Million SF, Corporate Offices in 10 countries
Execution is not just tactics – it is a **discipline** and a **system**.

And the leader of the organization must be **deeply engaged** in it.
Recognizing the Global Challenge

5 Data Management Principles

5 Planning Principles

WORKPLACE STRATEGY NEUTRAL
Facility, space and occupancy data, captured and reported as part of on-going project and/or business as usual activity, typically captured in a CAFM/IWMS application.

Example:
Space classification, vacancy, occupancy, capacity, lease and headcount and organization.
Provide ongoing strategic and daily operational planning to create projects to address the space and occupancy needs of the business units all in compliance with the established workplace strategy.

Example:
Stacking plans, test fits, occupancy strategies, facility strategies, consolidation plans, MAC
PLANNING PRINCIPLES
Apply planning methodology on all project sizes
# Responsibility Matrix

<table>
<thead>
<tr>
<th>Activity Type</th>
<th>Main Defining Criteria</th>
<th>PROJECTS</th>
<th>OPERATIONAL RESOURCES</th>
<th>PROJECT FUNDED RESOURCES</th>
</tr>
</thead>
<tbody>
<tr>
<td>MAC</td>
<td>Move, Add or Change in office areas, or purely furniture modifications in lab areas, where NO Capital $ are required</td>
<td>RE Manager</td>
<td>RE Manager</td>
<td>RE Manager</td>
</tr>
<tr>
<td></td>
<td>11 or less people are affected</td>
<td>Onsite Planner</td>
<td>Onsite Planner</td>
<td>Onsite Planner</td>
</tr>
<tr>
<td></td>
<td>no revision of infrastructure capacity</td>
<td>Onsite Planner</td>
<td>Onsite Planner</td>
<td>Onsite Planner</td>
</tr>
<tr>
<td></td>
<td>no revision to intended use (MP)</td>
<td>Onsite Planner</td>
<td>Onsite Planner</td>
<td>Onsite Planner</td>
</tr>
<tr>
<td></td>
<td>DE cost of US$50k or less</td>
<td>Onsite Planner</td>
<td>Onsite Planner</td>
<td>Onsite Planner</td>
</tr>
</tbody>
</table>

### Projects

#### Minor Project
- Less than US$50K (incl. all Cap/Exp managed by RE, excl. Legal, Broker fees, lease costs)
- RE Manager
- Onsite Planner
- Asset Mgt Prime
- FM
- Onsite Designer
- Local A&I
- Local MEP
- Local Furniture Specialist
- Local MEP

#### Major Project
- Greater than US$50K (incl. all Cap/Exp managed by RE, excl. Legal, Broker fees, lease costs)
- RE Manager
- Onsite Planner
- Asset Mgt Prime
- RE Manager
- Onsite Designer
- Local A&I
- Local PM
- Local Furniture Specialist
- Local MEP

### Strategic Projects
- New or new leased bldg
- New interior MP of existing bldg
- CRE Leadership selected Project
- Long-term tenant of major start-up
- RE Manager
- Onsite Planner
- Asset Mgt Prime
- RE Manager
- Onsite Designer
- CRE Leadership decision
- CRE Leadership decision
- Local Furniture Specialist
- CRE Leadership decision

### Facility Management
- Minor Lab/Technical Project
- Less than US$50K (incl. all Cap/Exp managed by RE)
- RE Manager
- BU, IS, FM (as reqd)
- N/A
- FM
- BU, IS, FM (as reqd)
- Local A&I
- Local MEP
- Local Furniture Specialist

### Major Lab/Technical Project
- Greater than US$50K (incl. all Cap/Exp managed by RE)
- RE Manager
- BU, IS, FM (as reqd)
- N/A
- RE Manager
- BU, IS, FM (as reqd)
- Local A&I
- Local PM
- Local Furniture Specialist
- Local MEP
Many types of spaces – many types of activity
Is it possible to MAC yourself out of a successful workplace strategy?
Utilize planning to define the project direction and scope
Pre-Project Planning Process Map

PRE-PROJECT PLANNING -> Approval -> IMPLEMENTATION
PLANNER

• Plans required work
• Understands the logic behind the strategy
• Links strategy with reality
• Numbers and design oriented
• Deliverable is a recommendation
• Can work remotely

IMPLEMENTER

• Implements planned work
• Understands the strategy and what needs to be done
• Doer mindset
• Activity oriented
• Deliverable is physical work completed
• Needs to be onsite
Focus on mathematics before graphics
### Space List needs for Group A

<table>
<thead>
<tr>
<th>CATEGORY</th>
<th>SPACE TYPE</th>
<th>QUANTITY</th>
<th>ASF</th>
</tr>
</thead>
<tbody>
<tr>
<td>OFFICE PROGRAM</td>
<td>Workstation</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Enclosed Office</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Drop In</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Proj Studio (5)</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Dept Area</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Dept Copy/Print</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Training</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Storage</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Collaboration</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Meeting Room</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Garage</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Special Purpose</td>
<td>Libarary</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Space</td>
<td>Customer Facing</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Laboratory</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Training</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Hardware</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>MultiMedia</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Lab Training</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>CATEGORY</th>
<th>SPACE TYPE</th>
<th>QUANTITY</th>
<th>ASF</th>
</tr>
</thead>
<tbody>
<tr>
<td>SUPPORT SERVICES</td>
<td>Coffee</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PROGRAM</td>
<td>Voice Data</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Corp Copy</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Conference L</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Conference M</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Conference S</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Phone Booth</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Emp Services</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Security</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Storage</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Video Conf</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Training</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Mail Services</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Kitchen</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Cafeteria Seat</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Wellness</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Fitness</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Exec Brief Ctr</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Auditorium</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### PROGRAM TOTALS - RECOMMENDATION

<table>
<thead>
<tr>
<th></th>
<th>SEATS</th>
<th>USF</th>
<th>RSF</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>USF-RSF</td>
<td>0.00</td>
<td>RSF</td>
<td>0.00</td>
</tr>
<tr>
<td>PS/SEAT</td>
<td>0.00</td>
<td>RSF</td>
<td>0.00</td>
</tr>
</tbody>
</table>
Leverage individual projects to drive portfolio evolution
Undertake annual property assessment reviews

PORTFOLIO METRICS REPORT (PMR)

Portfolio analysis illustrating performance metrics and trends

Systematic space and occupancy assessment of every location.

Portfolio Assessment Reviews (PAR’s)
Summary of 5 Planning Principles

1. Apply planning methodology on all project sizes
2. Utilize planning to define the project direction and scope
3. Focus on mathematics before graphics
4. Leverage individual projects to drive portfolio evolution
5. Undertake annual property assessment reviews
DATA MANAGEMENT PRINCIPLES
Define and collect only the data required
Identify the system of record for each required key data set
# Data Ownership

## Process: Lease/Building Data Management Process

<table>
<thead>
<tr>
<th>Data Owner</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Master Data Mgmt.</td>
<td>Submit Change request for Building data updates</td>
</tr>
<tr>
<td>Asset Manager</td>
<td>Submit Change Request for Building Closure</td>
</tr>
<tr>
<td>Lease Admin</td>
<td>Mark Lease record ‘Archived’</td>
</tr>
<tr>
<td>Lease Admin</td>
<td>Mark Building Record ‘Closed’</td>
</tr>
<tr>
<td>Lease Admin</td>
<td>Update portfolio change report</td>
</tr>
<tr>
<td>Lease Admin</td>
<td>Review change requests and make necessary updates</td>
</tr>
<tr>
<td>Lease Admin</td>
<td>Email notification to requester and other parties</td>
</tr>
<tr>
<td>FM Contact for Space</td>
<td>Coordinate closure of drawings/data/occupancy/ allocations with FM</td>
</tr>
<tr>
<td>Space Data Mgmt.</td>
<td>Submit Change request for Manual building updates</td>
</tr>
<tr>
<td>N/A Workstations Occupancy</td>
<td></td>
</tr>
</tbody>
</table>

**Main use**
- Office Type
- Building Status
- Building Name
- Address

**Other Notifications:**
- Finance Controller
- IDP Master Data Mgmt.
- S&P Asset Mgr.
- FM Space Contact
- TDS Data Mgmt.
Data Flow

Business Intelligence Overlay

Integration Layer

To Both Systems

Firmwide Directory

Location Info

Two way Integration

To Both Systems

Two way Integration

Lease Admin

Two way Integration

Finance

BU Hierarchy

Ariba

HR Employee

NEMS Contractor

Global Security

Web Browser

Project Management

Facility Work Orders

IWMS

Crestron

WorkSmart Aqilquest

Ariba

Firmwide Directory

Data Flow
Apply recognized industry standards for space management
### Space Classifications

<table>
<thead>
<tr>
<th>Business Support</th>
<th>Space Function</th>
<th>Space Type</th>
<th>Workplace Function</th>
<th>Workplace Setting</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Auditorium</td>
<td>Auditorium</td>
<td>Auditorium</td>
<td></td>
</tr>
<tr>
<td>Mail</td>
<td>Mail / Delivery Services</td>
<td>Mail</td>
<td>Mail / Delivery Services</td>
<td>Corporate mailroom and depot, generally located near Shipping &amp; Receiving.</td>
</tr>
<tr>
<td></td>
<td>Mail Support</td>
<td>Mail Support</td>
<td>Mail Support</td>
<td>Any other space within the 'Mail Footprint' that is not readily categorized into one of the other Mail classes</td>
</tr>
<tr>
<td></td>
<td>Audio/Visual Room</td>
<td>Audio/Visual Room</td>
<td>Audio/Visual Room</td>
<td>Equipment room supporting technology in various meeting room types</td>
</tr>
<tr>
<td></td>
<td>Boardroom</td>
<td>Boardroom</td>
<td>Boardroom</td>
<td>Meeting space designed for large gatherings of very senior firm leadership</td>
</tr>
<tr>
<td></td>
<td>Focus Room</td>
<td>Focus Room</td>
<td>Focus Room</td>
<td>1-2 Person Non-bookable room (In some cases may be a furniture solution ie Pod)</td>
</tr>
<tr>
<td></td>
<td>Small</td>
<td>Small</td>
<td>Small</td>
<td>3-6 Person enclosed meeting room. (In some cases may be a furniture solution ie Pod)</td>
</tr>
<tr>
<td></td>
<td>Medium</td>
<td>Medium</td>
<td>Medium</td>
<td>7-12 Person enclosed meeting room</td>
</tr>
<tr>
<td></td>
<td>Large</td>
<td>Large</td>
<td>Large</td>
<td>13-20 Person enclosed meeting room</td>
</tr>
<tr>
<td></td>
<td>Extra-Large</td>
<td>Extra-Large</td>
<td>Extra-Large</td>
<td>20+ Person enclosed meeting room</td>
</tr>
<tr>
<td></td>
<td>Conference - Video</td>
<td>Conference - Video</td>
<td>Conference - Video</td>
<td>Space specifically designed for groups of people to interact on an occasional basis having appropriate seating and other amenities to support this activity with added technology.</td>
</tr>
<tr>
<td></td>
<td>Conference - Support</td>
<td>Conference - Support</td>
<td>Conference - Support</td>
<td>Space specifically designed to support operations of a conference room.</td>
</tr>
<tr>
<td></td>
<td>Print Shop</td>
<td>Print Shop</td>
<td>Print Shop</td>
<td>Large reprographic rooms where printing services are available to the firm.</td>
</tr>
<tr>
<td></td>
<td>Waiting</td>
<td>Waiting</td>
<td>Waiting</td>
<td>Space with seating where people wait prior to entering another space or receiving service.</td>
</tr>
<tr>
<td></td>
<td>Storage</td>
<td>Storage - Amenity</td>
<td>Storage - Amenity</td>
<td>Space that has been designed for general storage; usually not conducive for use as office space.</td>
</tr>
<tr>
<td></td>
<td>Other Business Support</td>
<td>Other Business Support</td>
<td>Other Business Support</td>
<td>Any other business service space that is not readily categorized into one of the other classes. (i.e. internal stair, ATM, Restroom, added Mechanical/Electrical)</td>
</tr>
</tbody>
</table>
Create a culture focused on the importance of data accuracy.
Data Integrity
Capitalize on real time data for informed decision making
Timely Updates
Summary of 5 Data Management Principles

1. Define and collect only the required data
2. Identify the system of record for each required key data set
3. Apply recognized industry standards for space management
4. Create a culture focused on the importance of data accuracy
5. Capitalize on real time data for informed decision making
Audience Question?

How many of you believe these Principles will help with the implementation of a Workplace Strategy?
THE LINK....
Principles to Implementation of WP Strategy

In place and/or implemented as part of your WP Strategy

Information flow is essential

Projects built outside of WP Guidelines cannot be tracked

Comparison of before and after is not possible
### Planning and Data Management Scorecards

- Measures the supporting elements
- Actions that can be taken to improve the quality and effectiveness of the data

→ Planning & Data Management Principles…
→ Practice Scorecard…
→ Improvement Plan…
→ Continued Results
DM Score
• List of Actions

Planning Score
• List of Actions

Average client score across all elements key to the Principles of Data Management: 69%

Average client score across all elements key to the Principles of Planning: 61%
THREE KEY WAYS TO MEASURE SUCCESS
Four of five Planning principles implemented

Understanding this metric means
• analyzed all facilities
• know what can be done
• the gains to be made and..
• are ready to put into action

Planning – Portfolio Readiness Metric

60-70%
### Data Quality Metric

#### Weighted Score: 9.2

<table>
<thead>
<tr>
<th>Measurement</th>
<th>Description</th>
<th>Region A</th>
<th>Region B</th>
<th>Region C</th>
<th>Region D</th>
<th>Region E</th>
<th>GLOBAL</th>
<th>Target</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allocation 1.1</td>
<td>Space Classed that should never be allocated</td>
<td>0.00%</td>
<td>0.00%</td>
<td>0.09%</td>
<td>0.00%</td>
<td>0.00%</td>
<td>0.01%</td>
<td>&lt; 0.25%</td>
</tr>
<tr>
<td>1.2</td>
<td>Space level allocation with locked CCs</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>14</td>
<td>14</td>
<td>0</td>
</tr>
<tr>
<td>People 2.1</td>
<td>People without primary location</td>
<td>2.33%</td>
<td>2.21%</td>
<td>4.61%</td>
<td>4.31%</td>
<td>1.10%</td>
<td>2.51%</td>
<td>&lt; 4%</td>
</tr>
<tr>
<td>2.2</td>
<td>Overbooking</td>
<td>1.63%</td>
<td>2.12%</td>
<td>2.93%</td>
<td>6.51%</td>
<td>2.27%</td>
<td>2.72%</td>
<td>&lt; 5%</td>
</tr>
<tr>
<td>Space 3.1</td>
<td>Shared Space Types where Capacity = 1</td>
<td>0.00%</td>
<td>0.00%</td>
<td>0.23%</td>
<td>0.00%</td>
<td>0.00%</td>
<td>0.08%</td>
<td>&lt; 1%</td>
</tr>
<tr>
<td>Portfolio 4.1</td>
<td>Pending leased buildings with lease active</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>4.2</td>
<td>Closed buildings with active lease</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>4.3</td>
<td>Building measured NIA</td>
<td>3.03%</td>
<td>6.17%</td>
<td>3.57%</td>
<td>6.67%</td>
<td>0.00%</td>
<td>4.13%</td>
<td>&lt; 5%</td>
</tr>
<tr>
<td>Drawings 5.1</td>
<td>Open buildings not linked cad</td>
<td>0.00%</td>
<td>0.00%</td>
<td>0.00%</td>
<td>0.00%</td>
<td>0.00%</td>
<td>0.00%</td>
<td>0.0%</td>
</tr>
<tr>
<td>5.2</td>
<td>Sublease drawings vs. Lease (failed)</td>
<td>1</td>
<td>0</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>3</td>
<td>&lt; 5</td>
</tr>
</tbody>
</table>
Workplace – Actual Completed Projects Graph

See how you are performing for all projects over time.
Audience Question?

What is the worst thing to do when implementing a WP Strategy?

A. Not having principles or structure to help guide you
B. Assuming this is a simple or easy process
C. Assuming deployment will be quick
QUESTIONS

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www.hok.com
Thank you!

If you are interested in learning about or joining WE, please look for a Red Beret!