Building the Workplace Experience

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Agenda

Background
  — Context, Influencers and Drivers

Panel Discussion
  — Best Practices
  — Lesson Learned
  — Q+A

These are No Ordinary Times

“Why Social Media Will Fundamentally Change Business”
  — MIT SMR

“Overtime Rule Changes are Coming—Is Your Business Ready?”
  — Forbes

“Globalisation as We Know it is Over—and Brexit is the Biggest Sign Yet”
  — The Guardian

“Shocker: 40% of Workers Now Have ‘Contingent’ Jobs, Says U.S. Government”
  — Forbes

“How Demographics Rule the Global Economy”
  — The Wall Street Journal

Modern Advancements
  Pace of Business
  Forces of Globalization
  Changing Demographics
  Escalating Economic, Political, Social & Environmental Pressures
The Workplace Today is a Mass of Blurred Boundaries

Millennials are Now the Largest Labor Force

1 in 3 workers today are Millennials

Source: Pew
Today’s Workers Differ on the View of the Office

<table>
<thead>
<tr>
<th>Generation</th>
<th>Most Important</th>
<th>Least Important</th>
</tr>
</thead>
<tbody>
<tr>
<td>Boomer</td>
<td>Acoustic privacy</td>
<td>Engaging workplace</td>
</tr>
<tr>
<td>Gen X</td>
<td>Engaging workplace</td>
<td>Acoustic privacy</td>
</tr>
<tr>
<td>Gen Y</td>
<td>Engaging workplace</td>
<td>Meeting spaces</td>
</tr>
</tbody>
</table>

Source: Knoll Research, Generational Preferences: A Glimpse into the Future Office

Experiences Over Things

More than 3 in 4 millennials would choose to spend money on a desirable experience or event over buying something desirable.

Source: Harris Poll for Eventbrite
Executives are Prioritizing the Employee Experience

79% rated employee experience very important or important

Only 22% reported that their companies excel at building a differentiated employee experience

Source: Deloitte

A Multilayered Approach: A Series of Studies

2012

40 Organizations

110 Workplace Executives

2016

40 Workplace Experts: A+D, Academics, CRE, Workplace Executives, Workplace Strategists

1,400+ Knowledge Workers

Source: Knoll Research, Immersive Planning, From Research to Realization: An Experience-Based Workplace
Five Factors Contribute to A New Way of Working

1. Group-based Work is the Norm

2. Hospitality and Residential Influences Enter the Workplace

<table>
<thead>
<tr>
<th>Service</th>
<th>Provide now</th>
<th>Plan to provide in 5 years</th>
</tr>
</thead>
<tbody>
<tr>
<td>On-site Cafe/Coffee Bar</td>
<td>90%</td>
<td>4%</td>
</tr>
<tr>
<td>Complimentary Drinks/Snacks</td>
<td>43%</td>
<td>11%</td>
</tr>
<tr>
<td>On-site Dry-cleaning/Laundry</td>
<td>79%</td>
<td>8%</td>
</tr>
<tr>
<td>On-site Cafeteria</td>
<td>57%</td>
<td>11%</td>
</tr>
<tr>
<td>Outdoor Recreation Area</td>
<td>50%</td>
<td>14%</td>
</tr>
<tr>
<td>In-house Prayer Room</td>
<td>26%</td>
<td>4%</td>
</tr>
<tr>
<td>Nursing/Lactation Areas</td>
<td>80%</td>
<td>10%</td>
</tr>
<tr>
<td>On-hour Networking</td>
<td>57%</td>
<td>11%</td>
</tr>
<tr>
<td>Health and Wellness Services</td>
<td>14%</td>
<td>8%</td>
</tr>
<tr>
<td>Game Rooms</td>
<td>30%</td>
<td>19%</td>
</tr>
<tr>
<td>Daily Complimentary Meals</td>
<td>15%</td>
<td>8%</td>
</tr>
<tr>
<td>Childcare Services</td>
<td>14%</td>
<td>8%</td>
</tr>
</tbody>
</table>

Source: Knoll Research, Immersive Planning, From Research to Realization: An Experience Based Workplace

3. Despite Alternatives, Office is Still Home Base

% of the Workforce that Works in the Office

Source: Knoll Research, Immersive Planning, From Research to Realization: An Experience Based Workplace
4. Empowered by Choice, Employees Make the Workplace Their Own

Do you agree with each of the following statements? (% agree)

<table>
<thead>
<tr>
<th>Statement</th>
<th>Highly Dissatisfied</th>
<th>Highly Satisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>I am able to display personal items at my workspace</td>
<td>32%</td>
<td>86%</td>
</tr>
<tr>
<td>I am able to configure and adapt my workspace</td>
<td>37%</td>
<td>81%</td>
</tr>
<tr>
<td>I have access to a variety of types of individual and group spaces</td>
<td>29%</td>
<td>69%</td>
</tr>
<tr>
<td>I have the ability to choose where I work</td>
<td>23%</td>
<td>46%</td>
</tr>
</tbody>
</table>

Source: Knoll Research, Immersive Planning, From Research to Realization: An Experience-based Workplace

5. Management of the Real Estate Asset is Tighter Than Ever

<table>
<thead>
<tr>
<th></th>
<th>Today</th>
<th>In 5 Years</th>
</tr>
</thead>
<tbody>
<tr>
<td>% in Open Plan</td>
<td>78%</td>
<td>64%</td>
</tr>
<tr>
<td>% in Unassigned Workspace</td>
<td>?</td>
<td>32%</td>
</tr>
</tbody>
</table>

Source: Knoll Research, Immersive Planning, From Research to Realization: An Experience-based Workplace
As a Result, the Workplace is Evolving

The Workplace as an Experience

<table>
<thead>
<tr>
<th>Office as a Building</th>
<th>Workplace as an Experience</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employer provides tools on-site: phone, files, computer</td>
<td>Employees choose mobile devices: phone, laptop, tablet</td>
</tr>
<tr>
<td>Workers commute to site; physical presence expected</td>
<td>People flow in and out; remote, virtual connections possible</td>
</tr>
<tr>
<td>Connected by real estate</td>
<td>Connected by social networks, cloud computing</td>
</tr>
<tr>
<td>Location to get work done</td>
<td>An environment to foster culture, brand, community</td>
</tr>
<tr>
<td>Office as 2nd place: work site</td>
<td>Office as 3rd place: hub, town square, neighborhood</td>
</tr>
<tr>
<td>Company sets work hours, locations</td>
<td>Workers decide when, how, where to work</td>
</tr>
<tr>
<td>Architecture prescribes space</td>
<td>Actions of people define space</td>
</tr>
</tbody>
</table>

Source: Knoll Research, Immersive Planning, From Research to Realization: An Experience-based Workplace
Design for an Experience-based Workplace

Fluid Boundaries

Enhanced interaction

Connected Experiences

Group-based workplace

Comfortable furnishings

Blurred lines between work space types

Array of materials, textures and scales

Self-determining workspaces

Transitions

Source: Immersive Planning | From Research to Realization: An Experience-based Workplace

A work environment designed to support people, the flow of information, promote creativity and enhance a company culture can help a company solve challenging business problems and remain competitive in the marketplace.
Panel Discussion

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Thank you!

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