

# Workplace Strategy Services 1: Client Engagement Process

This is a chance to reimagine what your workplace can be - to build a new future where the role of the workplace is designed, with intention and purpose, to support the wide range of human needs of the people who work, grow, and connect in them.

## Our Outlook

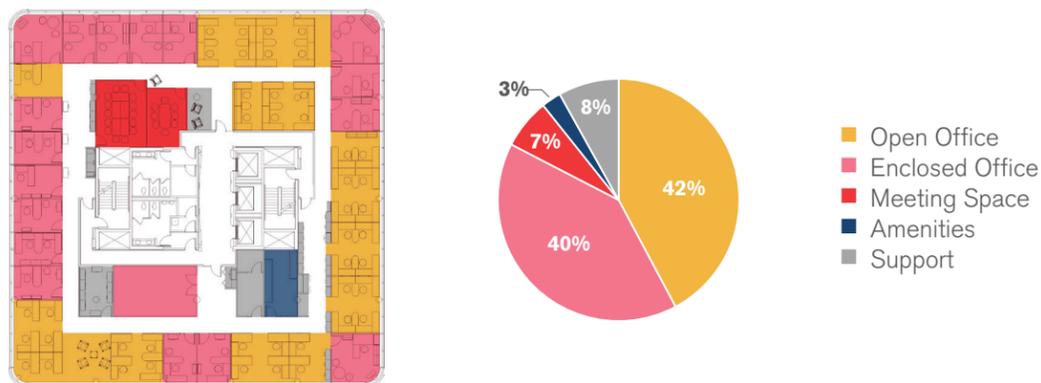
The COVID-19 crisis has forced the world to undertake the largest remote working experiment in history. This has shown businesses and workers what is – and isn't – possible to accomplish remotely. Many will have found that there are some tasks that are equally, or perhaps even more efficiently, done from home, while at the same time putting into sharp focus those tasks that are difficult or impossible to do without a dedicated workplace. Additionally, the powerful emotional benefits and community building that the workplace provides have made themselves painfully clear as many of us have been forced to get by without them.

As many companies try to figure out how to safely and responsibly get their workers back into the office, this presents a transformational opportunity to redefine what a workplace is, what it should be, what parts we have outgrown and should be discarded, and what new opportunities we can embrace.

To respond to the global landscape and evolving organizational needs, we have honed our workplace strategy process to develop **Future Workplace Guidebooks** virtually in a condensed time period – typically 8-16 weeks depending on scale and complexity.

## Phase 1: Immersion

**Data Gathering** – We collect as much information about your company as possible including org charts, staff lists, headcounts, company mission statements, program and floor plans of existing workplaces, space and furniture standards, technology standards, brand guidelines, etc.



**Existing Workplace Analysis** – We analyze the program and floor plans of your existing workplaces, assessing use and placement of various space types throughout. We then determine figures like square footage allocation and seat count ratios to give us an understanding of your current density and space utilization.

**Staff Survey** – We propose the co-creation of an online survey addressing topics such as work style preferences, workplace amenities, and technology use – pre-COVID, present time, and post-COVID-19. This allows us to see trends across the organization as well as distinct differences between departments or roles.

**Focus Group Interviews** – The engagement of leaders within your organization is critical in the development of a successful workplace strategy. We conduct one-on-one interviews with the Focus Group to gain individual perspectives, as well as to understand department structures, functions, work styles, and cultures.

## Phase 2: Visioning + Scenario Building

We learned a very effective **Visioning Process** from the Advertising industry and adapted it for the Workplace realm. The process was sometimes called 'Disruption' as the intent was to interrogate a company's mission and place in the world, benchmarking it against its' competitors, and then to disrupt that viewpoint by challenging the future, asking the question *'how can we change the world?'*

The purpose of the Visioning Phase is to create a strategy for organizational change and new ways of working supported by the physical workplace. Our Visioning Process runs through three curated workshops:



The workshop participants are the same Focus Group members engaged initially in interviews – typically a random cross section to get the most diverse responses. This year we have very successfully completed remote sessions using digital collaboration software, and we are happy to report they've been even more interactive than our in-person sessions!

A second facet to the Visioning Process is **Scenario Building**. Diving into and even scripting scenarios in-depth is vital for certain organizations. Essentially, it is an investigation into all of the unique ways a space can function in order to prescribe a client brief that will define all the flexible ways a space should perform. We explore both the employee and the visitor experiences across a range of employee and visitor types.

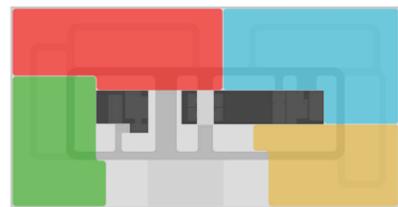
# Workplace Strategy Services 2: Future Workplace Guidebook

## Phase 3 + 4: Concept Design + Documentation

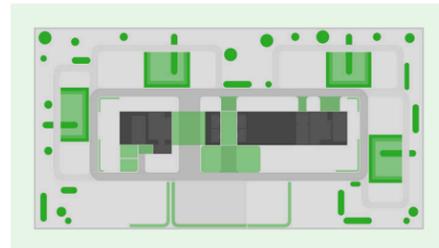
After getting to know your organization and aligning on your future workplace goals, we begin to develop design solutions in the Concept Design Phase. The phase is highly collaborative and iterative with several Focus Group workshops throughout. Ultimately, the final workplace strategy and design standards are documented in a comprehensive **Future Workplace Guidebook**. The contents may include:

**Organizational Diagrams** – This section conveys our understanding of how your organization works. It will cover the outcome of our data gathering activities and provide the basis for spatial recommendations.

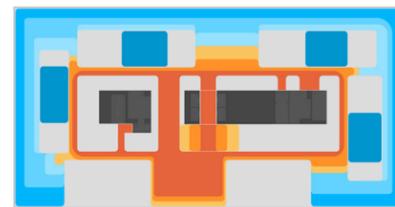
**Planning Concepts** – The planning concepts are specific to each of our clients and based upon factors that may include current and future needs, site constraints and opportunities. Our spatial recommendations will be covered at the macro-scale, and we will also present our concept for a typical ‘neighborhood’ – a unit between the scale of the office and the individual work setting.



Neighborhoods



Connection to Nature



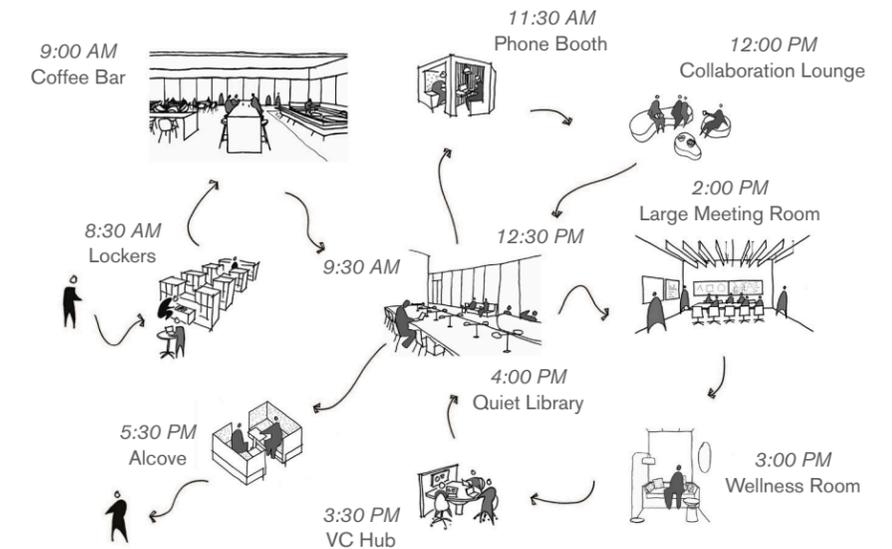
Acoustic Landscape

**Look & Feel** – This section outlines our proposed selection of materials and finishes for your workplace and can be supplemented by conceptual 3D renderings. We also explore Brand Expression – how your company identity can be captured and expressed throughout the physical work environment.

**Sustainability & Wellness Goals** – Through the client engagement process, we will work with the Focus Group to understand your sustainability & wellness goals. With COVID-19, the concept of wellness takes on another dimension, and it involves setting new standards for cleaning, touchless appliances, access to outdoor spaces, and much more.

**Planning Components** – This section drills down into micro-scale concepts of your workplace environment – the ‘kit of parts’ or work settings.

We will give our recommendations for FFE (furniture, fixtures, and equipment), functionality and use protocol, allocation and distribution, and example layouts/configurations.



## Change Management

Whenever new ways of working are adopted, a process of Change Management (CM) is key to the successful adoption of new working styles. Since our company has been intensively involved in transformational workplace projects, we have consistently supported our clients in this area. The CM strategy does not need to be demanding or very complicated, but it does need to be planned carefully.

Good change management can support in the effort to ensure employees adapt to the new ways of working promoted by leadership and developed in the future workplace guidelines. A fundamental principle is to engage with the employees from early in the process and solicit their involvement in a highly managed way.

**The idea is that employees who feel they have been included in the discussion about change will support change, and further that employees who understand the rationale will adapt to change fast and utilize the advantages and tools of new ways of working.**

In this supportive role, we work with HR to advise on policies and with IT to provide recommendations for appropriate technology. We have substantial experience in a wide variety of change management initiatives including designing pilot spaces to test planning components and developing workplace manuals to describe how best to utilize the new environment.

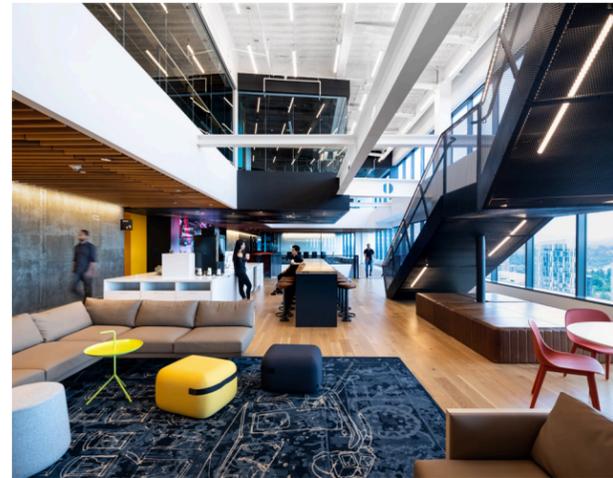
# Workplace Strategy Services 3: Guidebook Implementation

## Project Delivery

The Future Workplace Guidebook is a rich digital deliverable in PDF format that contains the holistic workplace strategy and design standards for your organization. The next step is implementation in renovation or new construction projects. Your guidebook can be included as part of an RFP for design services, or CWa can continue with the project delivery to ensure a successful outcome.

**Site-Specific Programming + Test-Fitting** – Using the Future Workplace Guidebook as our starting point, we will develop a space program and test-fit plan for the chosen site. To begin, additional surveys or interviews may be required with a cross-section of the site's end users to ensure we understand the unique aspirations and functional requirements. The final program will list all of the recommended spaces and their functions, square footages, and ratios per square foot or occupant. We will then prepare circulation, adjacency and massing studies in both 2-D and 3-D, with several alternatives, to present to and review with your organization. After receiving direction, we will synthesize the information gathered to date into a cohesive conceptual test-fit plan.

**Schematic Design + Design Development** – The design takes shape in the Schematic Design + Design Development Phases through an iterative methodology informed by regular feedback from your organization and any chosen consultants. Design possibilities are discussed regularly and decisions will be made in collaboration with your organization, aided by the production of renderings, VR environments, and architectural models.



The finish palette and basis of furniture design will also be presented and provided for pricing. We recommend a cost estimate be completed at the end of the Design Development Phase. Our expertise in BIM and shared digital work environments facilitates coordination and enhances our ability to more precisely control the project schedule and budget.

**Construction Documentation + Administration** – Based on the approved Design Development documents, we will prepare Construction Documents consisting of architectural drawings and specifications that detail the requirements for construction of the project. Documents shall be submitted to and coordinated with the City, and we will also provide documents for distribution to potential bidders. On some projects, we partner with a local Executive Architect whose role is to lead the production of Construction Documents, obtain permits through regulatory agencies, provide connections to contractors, and conduct on-site observations through completion.

Our design services include the full selection and specification of furniture systems and ancillary settings. Once selections are finalized, we will issue the furniture RFP and review final specifications, dimensioned layouts and purchase orders. We are very involved in this process because we believe that furniture has a tremendous impact on the overall success of the workplace strategy.

During Construction Administration, we will respond to all inquiries and submittals and visit the job site as needed, involving key consultants at each stage. Prior to commencement of construction, we will perform an on-site review and approval of the proposed locations for partitions, doors, utilities, and other major elements. We will also provide a thorough punch-list to be executed by the General Contractor.

**Move-In + Post-Occupancy** – Our team will work closely with your organization leading up to and during Move-In to implement the Change Management strategies set forth in the Future Workplace Guidelines and ensure employees make a smooth transition into the new workplace. We will also work closely with the General Contractor and necessary consultants to confirm their closeout procedures are thoroughly documented for facility management.

Finally, we recommend a Post-Occupancy Evaluation 6 months after Move-In to measure the success of the new workplace and inform future projects. These findings will help us understand if additional policy or space modifications are needed. Most importantly, we then have the opportunity to revise the Future Workplace Guidebook, ensuring future projects take these lessons learned into account.