Highlights from “The Once”
Alternative Workplace Strategies
Meet Our Presenters:

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President
Global Workplace Analytics

Gabor Nagy
Ideation & Research Program Manager
Haworth
“The once”

ALTERNATIVE WORKPLACE STRATEGIES

Fifth Biennial Global Benchmarking Study 2018

Originated by New Ways of Working, 2008-2014

Additional support provided by Workplace Evolutionaries
About the Survey & Report
What we examined:

- Drivers
- Approaches
- Management
- Barriers
- Change Management
- Policies/Practices
- Value & Benefits
Key Findings
Program drivers
Top Drivers of Change?

- Productivity
- Cost savings
- Attract/retain
- Collaboration
- Work/life balance
- Business agility
- Access to customers
- Business continuity

- 2017
- 2013
- 2011
Lowest Driver

25% (2011) vs. 2% (2017)
Rate the value of your program
Perceived value

<table>
<thead>
<tr>
<th>Business issues</th>
<th>People issues</th>
</tr>
</thead>
<tbody>
<tr>
<td>Key</td>
<td></td>
</tr>
</tbody>
</table>

**#1** Saving $  
**#2** Real estate flexibility  
**#3** Increased employee productivity  
**#4** Work/Life  
**#5** Employee attraction and retention + Increased employee satisfaction

<table>
<thead>
<tr>
<th>2009</th>
<th>2011</th>
<th>2013</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Saving $</td>
<td>Saving $</td>
<td>Employee attraction and retention</td>
<td>Work/Life</td>
</tr>
<tr>
<td>Real estate flexibility</td>
<td>Employee attraction and retention</td>
<td>Increased employee satisfaction</td>
<td>Work/Life</td>
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<tr>
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<td>Work/Life</td>
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<tr>
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<td>Increased employee satisfaction</td>
<td>Increased employee productivity</td>
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</tr>
<tr>
<td>Employee attraction and retention + Increased employee satisfaction</td>
<td>Increased employee productivity</td>
<td>Saving $</td>
<td>Saving $</td>
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</tbody>
</table>

*Work/Life*
### What do we measure?

<table>
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<th></th>
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<th>2013</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>#1</td>
<td>Space reduction</td>
<td>Employee satisfaction</td>
<td>Employee satisfaction</td>
<td>Employee satisfaction</td>
</tr>
<tr>
<td>#2</td>
<td>Cost reduction</td>
<td>Cost reduction</td>
<td>Employee engagement</td>
<td>Employee engagement</td>
</tr>
<tr>
<td>#3</td>
<td>Employee satisfaction</td>
<td>Employee productivity</td>
<td>Employee productivity</td>
<td>Cost reduction</td>
</tr>
<tr>
<td>#4</td>
<td>Employee engagement</td>
<td>Space reduction</td>
<td>Cost reduction</td>
<td>Space reduction</td>
</tr>
<tr>
<td>#5</td>
<td>Employee productivity</td>
<td>Employee engagement</td>
<td>Space reduction</td>
<td>Employee productivity</td>
</tr>
</tbody>
</table>

**Key**
- Business metrics
- Real estate metrics
- People metrics
There is a disconnect

Our top drivers are not the things we value the most and we measure those things that are easiest to measure.
Success Factors
Success Factors

#1 Technology

Very Important 63%
Important 18%
Success Factors

#2 Clear Expectations

46% Very Important
34% Important
Success Factors

#3 Robust Communications

40% Very Important
37% Important
Success Factors

#4 Training

Very Important 37%
Important 36%
Where people are working
I’m not giving up my stall! Where will I put my saddle, my blanket, my brush?
Biggest growth 2009 to 2016: Internal mobility

- Assigned: 48% vs. 53%
- Internally Mobile: 21% vs. 9%
External Mobility Flat

Externally Mobile (includes 1-2 days/week at home/other) 10% vs 8%

Internally Mobile 21% vs. 9%

Assigned 48% vs. 53%
Mostly home-based: Nearly flat

- **Home 3+ Days/Week**
  - 6% vs. 7%
- **Externally Mobile**
  - (includes 1-2 days/week at home/other) 10% vs 8%
- **Internally Mobile**
  - 21% vs. 9%
- **Assigned**
  - 48% vs. 53%
One in 7 does not track

Assigned 48% vs. 53%

- Doesn't Track 15%
- Home 3+ Days/Week 6% vs 7%
- Internally Mobile 21% vs. 9%
- Externally Mobile (includes 1-2 days/week at home/other) 10% vs 8%
- Doesn't Track 15%
Common Problems
Common Problems

Overworking
14% disagree
Lower Productivity
7% agree
Common Problems

Difficulty getting feedback from managers: 54% agree (vs 27%)
Use of coworking spaces (2017)? Intent?

% Use coworking

- Yes: 15%
- No: 85%

Planning to expand usage?

99% of existing users
Q. What value are you getting out of the utilization of third-party coworking spaces?

- Innovation: 40%
- Cost reduction: 40%
- Easier to enter new markets: 40%
- Experimentation: 30%
- Networking with outside peers: 25%
Employee Involvement
Employee Involvement

Ongoing Evaluations
61% in 2017 vs. 81% in 2013 (20% ↓)

Planning of Program (workstyles/workplaces)
36% in 2017 vs. 64% in 2013 (28% ↓)
Barriers to Initiatives
Top Barriers

<table>
<thead>
<tr>
<th>Category</th>
<th>2017</th>
<th>2013</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organizational Culture (entitlement trust)</td>
<td>51%</td>
<td>59%</td>
<td>75%</td>
</tr>
<tr>
<td>Manager Concerns</td>
<td>51%</td>
<td>57%</td>
<td>81%</td>
</tr>
<tr>
<td>Resistance/Fear of Change</td>
<td>49%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Executive Buy-in/Endorsement</td>
<td>41%</td>
<td>41%</td>
<td></td>
</tr>
</tbody>
</table>

2017  2013  2011
Other (Lower) Barriers

- Staff Concerns Over Losing Assigned Seat or Location: 2017 - 36%, 2013 - 38%, 2011 - 32%
- Staff Concerns Over Loss of Contact with Managers and Other Staff: 2017 - 19%, 2013 - 31%, 2011 - 30%
- Security Concerns: 2017 - 22%, 2013 - 21%, 2011 - 41%
Formalization
Formal Program

- Policies
- Tools
- Technologies
Formal Program in Place (e.g., including policies, tools, and technologies)
- 2017: 38%
- 2013: 29%
- 2011: 33%
- 2009: 35%

Formal Program in Some Subgroups, and Program Under Development in Others
- 2017: 18%
- 2013: 15%
- 2011: 19%
- 2009: 28%

Informal, Ad Hoc Practice (e.g., no policies, but services and technology may or may not be centrally provided)
- 2017: 28%
- 2013: 38%
- 2011: 35%
- 2009: 18%
Measures of Productivity
Measures of Productivity

- Employee satisfaction with workplace and systems: 2017 - 51%, 2013 - 41%, 2009 - 51%
- Management appraisal of achievement of performance targets: 2017 - 51%, 2013 - 43%, 2009 - 51%
- Employee self appraisal of productivity: 2017 - 35%, 2013 - 30%, 2009 - 30%
- 360 degree management and employee appraisal: 2017 - 21%, 2013 - 24%, 2009 - 29%
Who’s Leading?
Real Estate & Facilities Management (FM) 56%
- 33% of respondents
- 23% of respondents

Human Resources 47%
- 24% of respondents
- 23% of respondents

Executive Leadership 28%
- 11% of respondents
- 20% of respondents

ARE YOU ON BOARD?

WE

WORKPLACE

TRANSPORT

Exec HR CRE
Executive Endorsement
<table>
<thead>
<tr>
<th>Category</th>
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<th>2013</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Executive Leadership</td>
<td>17%</td>
<td>17%</td>
<td>20%</td>
</tr>
<tr>
<td>Human Resources</td>
<td>11%</td>
<td>11%</td>
<td>23%</td>
</tr>
<tr>
<td>Real Estate &amp; Facilities Management (FM)</td>
<td>13%</td>
<td>15%</td>
<td>23%</td>
</tr>
<tr>
<td>Information Systems (IS)/Information Technology (IT)</td>
<td>1%</td>
<td>2%</td>
<td>7%</td>
</tr>
<tr>
<td>Administration/Communications/Public Relations</td>
<td>2%</td>
<td>2%</td>
<td>7%</td>
</tr>
<tr>
<td>Finance/Accounting</td>
<td>1%</td>
<td>2%</td>
<td>7%</td>
</tr>
<tr>
<td>Marketing</td>
<td>1%</td>
<td>1%</td>
<td>5%</td>
</tr>
<tr>
<td>Sales</td>
<td>4%</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>Engineering/Design</td>
<td>5%</td>
<td>2%</td>
<td>4%</td>
</tr>
<tr>
<td>Operations/Production</td>
<td>2%</td>
<td>3%</td>
<td>4%</td>
</tr>
<tr>
<td>Customer Service/Call Center</td>
<td>3%</td>
<td>2%</td>
<td>4%</td>
</tr>
<tr>
<td>Procurement/Purchasing</td>
<td>3%</td>
<td>2%</td>
<td>4%</td>
</tr>
<tr>
<td>Other (please specify)</td>
<td>2%</td>
<td>11%</td>
<td>13%</td>
</tr>
<tr>
<td>Research &amp; Development</td>
<td>2%</td>
<td>2%</td>
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Download the free report at:
http://we.ifma.org/resources/we-research/

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Thank you!

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