FUNDAMENTALS OF WORKPLACE STRATEGY

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for **Kimball**®

I. Introduction.

Much has been written about strategy and workplaces under many titles: alternative workplace strategy, strategic facility planning, alternative officing, etc. The overall goal of this paper is to critically examine what we know about workplace strategy and present that knowledge clearly, representing the voice of reason.

II. Definition: What Is Workplace Strategy?

Workplace Strategy is:

"The dynamic alignment of an organization's work patterns with the work environment to enable peak performance and reduce costs." [1]

In practice, a workplace strategy is:

*"a systematic approach for improving the **effectiveness** and **efficiency** of how work space is **used** by changing the way work space is **configured**."* [2]

Workplace Strategy development coordinates information from all the fundamental domains of an organization (IT, HR, CRE/FM, Finance, etc.). Typically, each domain develops its own strategy. Success depends on all the different strategies reflecting and aligning with the overall business strategy. That comprehensive strategy should reflect the vision, mission, goals, and objectives for the organization as a whole. [3]

Tactics versus Strategy

Strategy and *Tactics* are often confused. Tactics are the actual means used to achieve an objective, while strategy is the overall plan, which may involve complex operational patterns, activity, and decision-making that lead to tactical execution. [4]

A critical workplace tactic is workplace design:

... the process of creating and/or modifying the workplace....*"the activities of programming, design, building, maintenance, management, and renovation."* [5]

Whereas workplace strategy:

... takes a long-term view of design solutions that affect the workplace...*"through a deep understanding of the organization's long-term, as well as immediate goals, and as such takes into consideration the underlying organizational resources of the business."* [6]

III. Context: Why Is Workplace Strategy Important?

The physical work environment – the buildings, private offices, cubicles, work spaces, meeting rooms, team rooms, and mobile workplaces – has a significant effect on people's behavior and performance. Unfortunately, *there is a good deal said about this topic, but not much is known about it.* Even more unfortunate, is that most decisions about office design are made without considering their implications for performance. [7]

> If done well, a good workplace strategy will allow organizations to get the greatest return on their investment.

Workplace Strategy treats the workplace as a strategic asset and enables organizations to align how they plan, design and manage their workplaces with the business goals and objectives of the organization. If done well, a good workplace strategy will allow organizations to get the greatest return from their investment. A good workplace strategy should lead to effective and efficient workplace designs that:

- Reduce Real Estate and Facilities Costs
- Improve work performance
- Increase organizational agility and flexibility
- Improve communication & collaboration
- Increase creativity & innovation
- Increase employee satisfaction
- Improve employee work-life balance
- Improve brand, image identity and culture
- Attract and retain the best talent

- Reduce environmental impact
- Improve healthy work environments

What Drives Interest In Workplace Strategy?

In a word – change. For 100 years, change in office design was relatively slow. However, over the past 20 years, the magnitude and pace of change in several areas has pressured office designers, planners and managers to develop new and better ways of supporting how people work. Several factors drive interest in Workplace Strategies and new methods of working:

a. Economics

Beginning in 2007, the economic downturn pressured organizations to be as efficient and effective as possible in all areas, especially Real Estate and Facilities.

Personnel remains the single largest expense and the greatest asset of any organization. Businesses are continually looking for ways to both lower costs and increase performance and effectiveness. Consequently, our successful workplace strategy seeks to both improve worker performance and organizational effectiveness, and reduce Real Estate and Facilities costs.

One way organizations lower workplace costs is to improve the office's ability to accommodate change. Reconfiguring workplaces, called churn, is a major cost Facilities Managers seek to control. The cost of churn varies widely depending on the nature of workplace change. Moving only boxes and people can cost several hundred dollars each, whereas the redesign of workplaces involving furniture moves or construction can cost thousands of dollars.[8] Strategies emphasizing agility and flexibility while controlling or reducing costs are essential to effective facilities management.

> # One way organizations lower workplace costs is to improve their agility and flexibility to accommodate change.

b. Technology

Technology has and will continue to change work and life. Recent attention to workplace strategy is driven by interest in, and usage of, smaller, more powerful and more mobile devices that allow people to work seemingly anytime from almost anywhere. Examples include: smart phones, laptops, greater availability and access to high-speed broadband and wireless networks, expanding application and content of web-

based information, and new ways of communicating through social networks, texting, and tweeting.

c. Work

The world of work is becoming increasingly complex. A recent IBM survey polled 1,500 CEOs about the state of the future of business. The study reported that today's world of work is substantially more volatile, uncertain, and complex. Seventy-nine percent of CEOs anticipate greater complexity in the future. Sixty percent indicate the best way to defy complexity is with creativity.[9]

The nature of work is fundamentally changing. Work itself is becoming increasingly knowledge based.[10] Knowledge-based work is more cognitively complex, dependent upon social skills and technological competence, and time pressured.[11]

Knowledge work tends to be more team-based and collaborative, which has led to changes in the organizational structures that govern work.[12]

> *"The bottom line, then, is that while professional workers are spending less time in the office each week, the meaning of that time may have changed in important ways. The office has become an important location for symbolic, learning, and creative interactions. A direct result of this trend is that the design and décor of offices has taken on a renewed importance for corporate managers. Beyond simple notions of size and comfort, office design has gained attention for its ability to meet the emerging needs of workers who spend fewer, but perhaps more important, hours in the office."* [13]

Work is increasingly **multi-modal.** Some discussions of office work mix work behaviors, such as socializing, learning, and collaborating with work modes.[14] From a purely functional view, there are only *two modes* of work: *independent* or autonomous work; and *interactive* work.[15, 16]

There *are* many different work behaviors, some of which can be done in either independent or interactive work modes (see Figure 1). Some discussions focus on the difference between solo work and group work. While that distinction appears to be only a semantic difference when considering the model shown in Figure 1, in fact, some people engage in independent work while part of a group.

For example, during a presentation, everyone in the group may read words on a slide at the same time, but the work behavior of reading is actually performed independently. Similarly, during interactive group collaboration, individuals may engage in independent thought, all while part of a group. There is often a constant transition between work modes.

Figure 1. Work Modes and Work Behaviors[17]

Work Behavior		Independent	Interactive
	Thinking/Focus	✓	
	Reading	✓	
	Writing	✓	
	Paper handling	✓	
	Storing/Filing	✓	
	Computing	✓	
	Collaborating		✓
	Meeting		✓
	Communicating	✓	✓
	Planning	✓	✓
	Learning	✓	✓

Source: Shaw, E. 2001, Springer 2008, 2010

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All office jobs involve **both** independent and interactive work modes. Independent work usually involves focused concentration and benefits from little or no distraction or interruption. Interactive work benefits from fewer boundaries and barriers and more visual and auditory openness. Interactive work can be formal or informal, work-related or social, local or remote, in real time (synchronous) or delayed (asynchronous), and may or may not result in collaboration. Collaboration is goal oriented communication.

The increasing complexity of work puts pressures on people to transition rapidly between modes and tasks**.** The term *multitasking* is often used to describe this new reality. The implication is that people can do multiple tasks at the same time and do so effectively. However, our brains do not allow us to perform multiple tasks simultaneously. In reality, people rapidly shift attention and focus between tasks. *Awareness* is key to easy and effective transitions between work modes and tasks. The challenge for workplace strategy and design is to support the different work modes and associated tasks and behaviors, and facilitate rapid and easy transition between them.

Technology enabled.

Technology has dramatically expanded the methods by which people communicate. Examples include: blogs, wikis, RSS feeds, Instant Messaging (IM), social media, texting, group calendars, web conferencing, apps, desktop sharing, chat rooms, bulletin boards, and discussion threads.[18]

Some new ways of work are enabled by new technologies. Smaller, more powerful and mobile tools allow people to work from a greater variety of locations both in the office and elsewhere. That doesn't mean everyone can work from anywhere. Rather, it presents possibilities for exploring how best to support the most efficient and effective ways of working.

Emphasis on collaboration

Increased emphasis on collaboration has also changed the way people work. As noted earlier, all office jobs involve both independent and interactive work modes. While research evidence shows increased collaboration can lead to improved organizational performance,[19] collaboration must be balanced with needs for focused concentration.

> # Increased emphasis on collaboration has also changed the way people work.

d. Workforce

Changing workforce composition and dynamics contribute to demand for changes in the workplace. Managing four generations in the workforce challenges organizations seeking appropriate strategies to address issues of work-life balance, diversity, aging, recruiting, and retention. The benefits, and work attitudes of the 20th century are simply no longer relevant for many of today's workers.[20]

Work-life balance

Work-life balance is sought by all generations in the workforce as they adjust to changes in family composition, labor force participation and expectations of the younger generation.

The number of dual-earner couples has increased from 66 percent in 1977 to 80 percent in 2008.[21] Dual-earner families struggle to juggle responsibilities of both work and family. Women, earned more higher education degrees than men since 1982, and will likely increase their participation in leadership roles. [22] Consequently, more men are sharing or taking the lead in household and care-giving tasks. The *2008 National Study of the Changing Workforce*, reported men now experience higher levels of work-life conflict than women.[23]

Diversity

Today's workforce reflects the growing diversity of the general population. People from a broad variety of backgrounds and cultures contribute to the robust tapestry of the workforce.

Workplace strategy can broaden workforce diversity. For example, mothers with small children, or workers nearing or past retirement age may work part-time or job-share. Persons with certain disabilities and caregivers may be most comfortable and effective working from home.

Aging population

- More than 35 percent of the population will be 50 and older in 2020. [24]
- Seventy-three percent of workers aged 50-70 who have not retired, plan to work into their retirement years or never retire.
- Older workers' participation in the workforce will be more intensely needed as the labor force growth rate dwindles and organizations vie for talent.
- In the U.S., one in five employees currently provides eldercare, and one in two expects to provide eldercare within the next five years.

Recruiting and Retention

The challenges of recruiting and retaining the best talent remain, even in a recessionary job market. Those organizations that can offer the broadest range of work place alternatives stand the best chance of securing talented employees.

e. Preparedness.

In the wake of the events on September 11, 2001 attention to contingency planning and the need for business and organizational continuity increased. Emergencies (snow, power outages, floods, strikes, viral and other illness, etc.) disrupt business. Effective, creative workplace strategies can minimize the impact of any disruption and ensure business continuity.

For example, the federal government used telework to great effect during the record making 2010 snow storms that hit Washington, DC (the "snowpocalypse"). The government revised its original estimate of the cost of lost productivity from snow-related federal office closings from $100 million-a-day estimate down to $71 million to account for the growing number of teleworking federal employees. [25]

f. Environment

Office buildings consume the most energy of all building types, accounting for 19 percent of all commercial energy consumption. [26]

Increased attention to sustainability, ecology, and environmental impact has helped raise interest in ways to minimize the consumption of energy and resources.

Reduced carbon emissions, material consumption, travel, and energy are potentially attractive benefits of some workplace strategies. But, of all the declared

benefits from those strategies that reduce the time people spend in offices – specifically telework – claims of reduced environmental impact are the most complex and nuanced.

On the surface, it seems logical: reducing or eliminating commuting resources (fuel, emissions, time, etc.) is good for the environment. Yet, preliminary scientific evidence suggests the impact of telework is complex and farther reaching than originally believed.

Spending less time, money, fuel and other resources commuting does not necessarily mean those resources are saved or not consumed—they may be used in other ways. [27] Many telecommuters end up driving just as much as their office-based co-workers running errands, or going to lunch meetings. One researcher noted, *"The environment doesn't care whether we drive in the morning or drive over the weekend, what it cares about is we reduce the miles we travel."* [28]

Similarly, reducing real estate holdings would seem to decrease energy consumption. However, some of those savings are displaced by the energy and materials (e.g. technology, furniture) necessary to support working elsewhere. At home, employees have to equip and power their work area, and often end up duplicating materials shared at a company office.

Telecommuting uses electricity, which produces energy-related emissions, like methane and nitrous oxide. In practice, most telework programs lead to mixed savings and sustained or duplicated use of transportation, heating, cooling, lighting, and electronic and electrical equipment both at the company and the home office. To realize the full potential environmental benefit from reducing real estate holdings, the space and buildings must be unused and decommissioned. [29]

IV. Process: What Are The Steps In Developing Workplace Strategy?

Broadly speaking, there is never a bad time to think strategically about workplace. In practice, the importance of having a sound workplace strategy increases as organizations plan for, or are undergoing changes. Examples of changes:

- The need or wish to reduce office costs
- Leases nearing expiration prompt review of space needs
- Need to increase agility and flexibility
- Desire to increase collaboration and innovation
- Changes in the number of employees
- Changes in ownership of the corporate building(s)
- Mergers or outsourcing

- Plans for improving building systems for light, heat, and ventilation
- Changes in leadership and organizational culture or brand
- Plans for strategic location / presence [30]
- Regulatory changes

Research shows organizations seldom consider developing or changing their workplace strategy.

In spite of the reasons listed above, without some financial benefit, (i.e. reduced space and reduced facilities costs), research shows organizations seldom consider developing or changing their workplace strategy.[31, 32]

Most organizations begin their workplace strategy development by asking a number of related questions:

1. How is our space being used today?

Workplace strategy typically begins with a space utilization study. Data regarding space use can be gathered in many ways: a "bed check" or counting what spaces are occupied—or have signs of occupancy (like a sweater or coat, a cup of coffee or soft drink)—at different times of the day over a week, month, or quarter; a survey of how and where people work; data collected from building systems and sensors that track how many people enter and exit a particular room; data from IT regarding who accesses organizational data, when and from where.

This type of information helps develop a picture of what space is used, when it is used and by how many people. These data help an organization determine whether their current work space is efficient and effective in supporting how people work and if they are getting the most return on their workplace investment.

2. How well does our workspace support our employees in the performance of their jobs?

How well the workspace supports job performance is closely linked to space utilization. If many work spaces are not used or are unoccupied and work is still getting done, then an organization needs to determine where the work is being performed, and how the existing workplace might be changed to better support employees as they work.

Besides space use information, employees themselves can provide valuable opinions on how well their workplace supports the performance of their jobs.

3. Are there any initiatives that have or will change how or where work is performed?

Change initiatives often offer an opportunity to assess the efficiency and effectiveness of workplaces. New technologies, new work processes or changes in work flow, new markets, new products, organizational restructuring, lease expiration, acquisitions, mergers, and divestitures are all major changes that warrant examining workplace strategy, and, if necessary, adapting how workplaces are planned, designed, and managed to better meet the new realities.

Once an organization has information in hand regarding these three questions, they can begin to formulate strategies that address important questions such as:

- How much space do we need?
  - o Do we have too much or too little?
  - o Is it in the best location?
- What types of work spaces and work settings will best support our employees?
  - o Do we have the right mix (i.e., enough of the right kind of spaces)?
- How will we measure success?

A general process map for developing a workplace strategy is shown below (see Figure 2).

Figure 2. Workplace Strategy Process Map
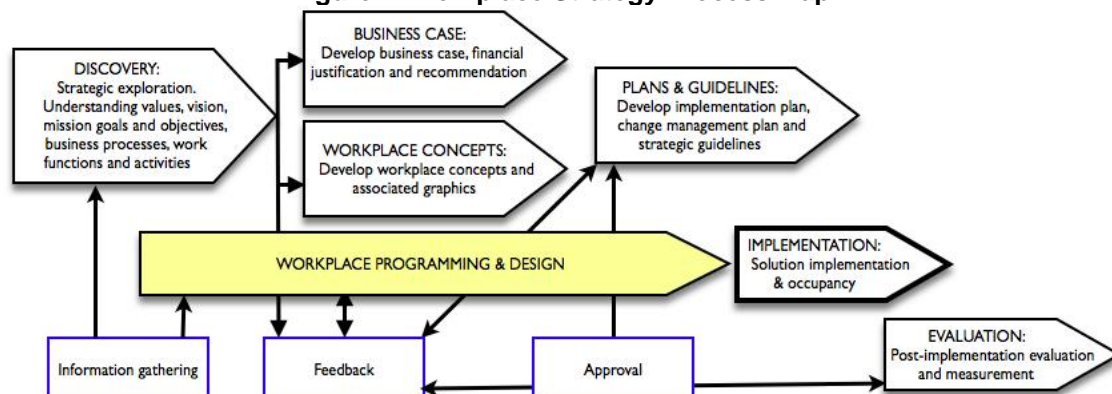
V. Examples: How Are Workplace Strategies Applied?

The optimum workplace strategy will vary greatly depending on the nature of the work and the needs of the organization.

Figure 3, illustrates examples of how one might apply workplace strategies. Most aim to achieve one or more goals: increase space efficiency and lower costs and/or increase communication and collaboration. The implementation of the strategies involves working in-office or elsewhere, or a combination of both.

Space efficiency and lower costs

Space inefficiencies are often the result of a mismatch between the functional characteristics of workplaces and changes in the ways work is accomplished.

Aligning workspace functionality to better support work modes and work behaviors can result in greater space efficiency (i.e. less space for the same number of people or more people in the same space) thereby reducing associated workplace costs.

Examples of strategies to increase space efficiency and lower costs:

a. Reducing individual footprint
b. Moving employees out of private offices into open plan or cubicle workspaces
c. Flexible work schedules - reducing the total number of workspaces required to support the work force.
d. Telework, distributed work, or telecommuting

Figure 3. Examples - Applying Workplace Strategy

Increase communication and collaboration

Increasing communication and collaboration is hard to do. Many workplace strategies are, in fact, aimed at cutting costs but are sold as ways to increasing communication and collaboration. Lowering partitions, increasing density, and "forcing" greater contact does not necessarily lead to more collaboration. One negative side effect of poorly executed strategies leading to increased density and openness is greater noise and distraction resulting in lowered performance. Care must be exercised when using office design to achieve strategic goals.

According to Thomas Allen of MIT, the best way to encourage communication and collaboration is to increase opportunities for face-to-face interaction. Allen observed: "*We do not keep separate sets of*

people, some of which we communicate in one medium and some by another. The more often we see someone face-to-face, the more likely it is that we will communicate in some other medium."[33]

Research shows a distinct relationship between distance and frequency of communication (i.e. the more distance there is between people — 164 feet or more to be exact — the less they will communicate).[34]

Examples of strategies to increase communication and collaboration:

a. Creating more informal interaction spaces and flexible group spaces
b. Clustering workspaces
c. Lowering partitions

d. Activity zones - Creating functional zones to support different work modes and behaviors. (e.g., focussed concentration zone vs. collaborative brainstorm zone)

e. Web-enabled virtual group spaces

Workplace strategies support people working either in-office or elsewhere.

- **In-office strategies**: Few organizations will be able to eliminate their office space. Consequently, one of the challenges in developing effective and efficient workplace strategies is redesigning existing office space to maximize the efficiency of space and provide effective workspaces that support changes in the ways of work. For some, being in the same place at the same time with colleagues working in a highly collaborative style is most effective. Others may need a specific place that offers freedom from distraction and the ability to concentrate without interruption. Still others may need the ability to connect quickly with both human and technological resources that are in remote locations. The same person may need each of these types of workplaces at different times.

Examples of redesigned office strategies include:

o Multipurpose space – Using space for different activities over time reduces the need for dedicated, specific function spaces.

o On-site/flexible/drop-in spaces – Unassigned workspaces available on a just-in-time, first come, first-serve basis.

o Hotelling – Treating workspaces like a hotel where workers reserve a space for the time needed and release it to be used by others when they are finished.

o Zones and neighborhoods – Creating activity-based spaces that are clustered together. For example, quiet spaces might be zoned together and buffered from spaces where activities create more noise.

- **Elsewhere strategies**: *Distributed work, virtual work, telework* or *telecommuting* are expressions used to describe strategies where people work from someplace other than the traditional office. The number of organizations adopting some form of distributed work or telework is increasing.[35] Often these programs are informal and people engage in telework for part of a day or only one or two days a week. The rest of the time they are in an office.

Examples of strategies involving working elsewhere include:

o Telework – Technology enabled work from sites other than the office, often workers' homes.

o Satellite offices – Company controlled office spaces located outside the main office, generally closer to workers' homes or client locations.

o Third place – Cafe', library, airport, hotel, client office. [36]

Despite the attention given to distributed work, telework and other alternative workplace strategies, and new ways of working, telework is not the only type of workplace strategy, nor is it right for every job type, employee or organization.

The greatest benefit of workplace strategy lies in redesigning office workplaces to better support how work gets done.

The majority of office workers continue to work in offices, often at assigned workplaces.[37] A small portion of the workforce may work full-time from elsewhere. Thus, the greatest benefit from workplace strategy lies in redesigning office workplaces to better support how work gets done.

VI. Impact: Examples

- **Office Redesign**

A substantial body of knowledge has accrued over decades of research focused on how the physical work environment affects workers and work performance. The following are select examples of workplace impact.

Space Reduction/Cost Savings

Innovative workplace design appears to reduce facility costs. There are numerous cost-raising factors, such as high investments for renovations, expensive IT, leasing of external workplaces (home, in a hotel or satellite office) and more intensive management of jointly used workplaces. However, this is counterbalanced by major cost savings, particularly due to fewer workplaces and a smaller need for space, lower energy consumption, reduced maintenance costs, and lower internal moving costs associated with easier changes.

Some organizations invest all or most of the savings in well-equipped, flexible workplaces. In other companies, actual lower operating costs have been realized, not per workplace or square meter (innovative workplaces are relatively expensive), but rather per employee and FTE (full-time employee).[38]

Cisco redesigned its office space for administrative workers. They call the new concept "The Connected Workplace." The new concept virtually eliminates

dedicated workspaces and increases shared spaces available to everybody while reducing square footage per employee from 160 to 106 square feet. Cisco reports, "It raises productivity, enhances collaboration, and increases employee satisfaction, while reducing real estate and technology costs."

Benefits to Cisco's design include reduced environmental impact. The total number of per-capita IT-related hardware devices was cut by 22 percent. Total per capita IT equipment wattage fell 44 percent, lowering greenhouse gas emissions. Also, less hardware reduces consumption of materials and eventual e-waste.[39]

Communication, Collaboration, Creativity & Innovation.

Creative interactions can take place anywhere - individual offices, hallways, lunch rooms, informal spaces, and meeting rooms. The challenge is to support both independent and interactive work and easy transition between the two modes.

Collaboration, creativity, and innovation are difficult to quantify. Successful companies whose culture embraces and reflects creativity in both their work and their workplaces are easy to find. Popular examples include Google[40] and Pixar.[41] Companies in more traditional industries implementing creative workplaces into their workflow include Kaiser Permanente[42], SCAN Health,[43] and AT&T[44]

Workspaces that accommodate creativity share a number of practical features:
o The workplace has an experimental component—Creative workers like visual stimulation.
o The new workspace is productive—It adjusts to the flow of modern creative work.
o It provides diversity—A wider and richer range of work settings that can support creative and collaborative work.
o It includes more shared space, space that is not owned and can be used by different staff over time. [45]

Performance Improvement

A 2006 study at GE Commercial Finance showed that poor use of office space was actually hindering the company's performance and relationship with customers. In response to business clients' dissatisfaction with loan processing time, an investigation looked into the the matter. The study pinpointed a major problem: the *physical location of key employees*. Loan approval required 22 different handoffs and two miles of walking, meaning loan approval dragged out for months. Parts of the operation were spread across two buildings, with different teams — legal, sales, closing — situated on different floors.

In response, the company replaced single-function departments with new, cross-functional teams so workers no longer had to walk or send documents back and forth between departments. After physically reassigning employees, loan processing time dropped to less than a month and required only seven handoffs.[46]

Recruiting and Retention

Studies show a well-designed office is one of the easiest and most cost-effective ways to retain workers and make them more productive. General Electric, Microsoft, and Group Health are among many major organizations reaping the bottom-line benefits of smart, worker-oriented designs.[47]

- **Work Elsewhere**

Cost Savings

Because few people or organizations can sustain strategies involving working elsewhere full-time, benefits associated with those strategies include redesign of existing office space.

Sun Microsystems implemented an office consolidation initiative. The company cut costs significantly since 19,000 employees (56 percent of its workforce) work away from the office at least one day per week. The company reduced its real estate holdings by 15 percent in fiscal 2007. [48]

> Studies show how a well-designed office is one of the easiest and most cost-effective ways to retain workers and make them more productive.

Environmental Impact

The environmental benefit of telework programs depends on climate, commuting patterns, induced energy usage, characteristics of the office and home space, and equipment use.

Work-related transportation (commuting) impacts could be reduced as a result of telework; however, home-related impacts due to an employee spending additional time at home could potentially offset these reductions. Company office-related impacts may not be reduced unless the office space is shared with other employees during telework days or eliminated entirely.[49]

VII. Conclusion

The world of work, and the places that support it, is undergoing substantial, dynamic, even volatile change. Driven by changes in economics, technology, demographics and ways of work, workplaces must evolve to be more flexible, supportive, innovative and agile. Workplaces are important strategic assets from which organizations can expect a return on investment.

Through workplace strategy, the planning, design and management of workplaces will increase the efficient and effective use of space to support workers in the performance of their work, realizing the full potential of this important strategic asset.

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Tim Springer, PhD, President and founder of HERO, inc., brings unequalled expertise in workplace consulting to every HERO engagement.   Tim has been described as one of the top two or three experts in the world on issues of knowledge worker performance, office ergonomics, work behavior and the work environment. With 30 years experience in research and consulting, Tim is one of those rare people who can back up their academic credentials with consulting expertise and real world experience.

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End Notes

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