

RETURN-TO-THE-WORKPLACE:
**PROVIDING PURPOSE
FOR PEOPLE, PLACE,
AND PARTNERS**



TRANSWESTERN

REAL ESTATE
SERVICES

We're here to guide you.

The journey back to the workplace after COVID-19 is evolving daily.

This process will be a marathon, not a sprint, and should be carefully considered. While each organization's approach will be specific, there are some universal areas to consider as you progress through this journey.

We don't know where this journey will take us but we are here to guide and support your organization acting as your trusted advisors.

- **We'll help you wade through the abundant information.**

In this roadmap, we provide overall guidance with specific and actionable resources timed to meet your organization wherever you are on the journey.

- **Guidance is organized across five constituents.**

These constituents, "leadership, workforce, workplace, building, and partners", will remain consistent across all time horizons.

- **We will publish resources to be used in tandem with general guidance.**

We will publish tactical resources for client utilization. We have linked documents throughout this roadmap to be used in conjunction with this general guidance.

- **This document is iterative and ever-evolving.**

This roadmap is designed to provide iterative guidance. As situations and scenarios evolve, so too will our guidance so that it remains relevant and captures both best practices as well as forward looking considerations.

This guide is a high-level plan and we strongly encourage you to engage with your local resources to best set your return to the workplace.

While every effort was made to ensure the accuracy and reliability of the information provided herein, it should not be considered medical or legal advice. The recommendations provided herein are based upon CDC recommendations and other third-party health organizations/professionals deemed reliable but are subject to changes made by the CDC and those third parties. Local laws vary. The information herein is general in nature and not intended to address every situation, some of which may require individual legal interpretation.

THE PROCESS

The return to the workplace will look different for every organization. Despite differences in government orders, returning to the workplace will be phased for most, if not all organizations. To help with your return, we have organized our guidance into three phases, each requiring a different set of goals and expectations but rooted around three main groups: people, place, and partners.



Lean Into Purpose

The goal of Phase One is to focus on behaviors and actions to support your workforce and partner relations.

Identify and address urgent operational needs, but limit large capital investment and all sweeping changes.

Get Ready to Shift

The goal of Phase Two is to understand and balance normalizing behaviors with next steps planning.

Your operations and cost of operations are normalizing around re-engineered processes, protocols and tools. You can now begin to plan for investment as the new normal is emerging.

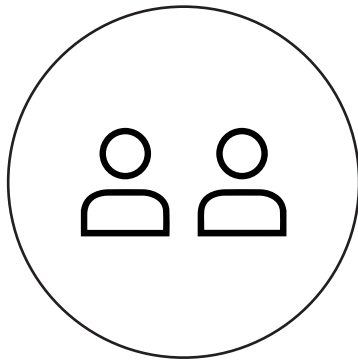
The Shifting of Purpose

The goal of Phase Three is to define both physical and virtual experiences, based on data to re-imagine the purpose for place and support real estate decisions.

Your operational practices and associated costs are normalized for existing assets. You must continue to monitor and plan for shifts. Include operations impact as part of your larger capital investment. Align investment strategies with necessary people and place experiences; evaluate physical and technological assets and implement shifts to support refined experiences.

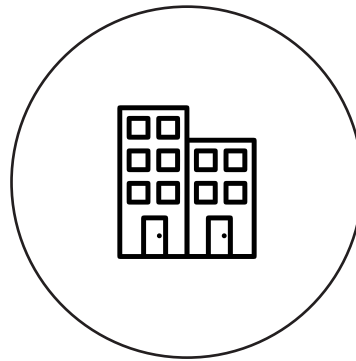
HOW TO UTILIZE THIS DOCUMENT

Throughout this document, you will notice we organize information as it pertains to three groups: people, place, and partners. As you enter each new phase, you should develop strategic plans to address the concerns and changes across each group. We will provide guidance and resources to address each group, and sub-groups that live within them.



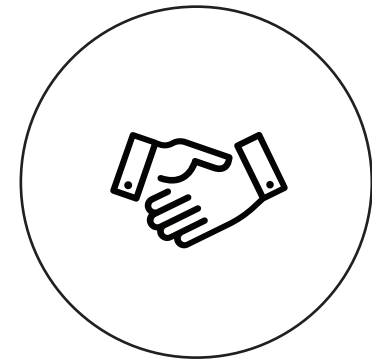
People

- **Leadership:** Your C-Suite, managers, and COVID-19 task force members.
- **Workforce:** Employees at any level who will be affected by the return to the workplace.



Place

- **Building:** Locations within your portfolio where protocols are determined by a third party.
- **Workplace:** Locations within your portfolio where protocols are determined by leadership.



Partners

- **Relationships:** Operational partnerships such as HR consultants, IT teams, and legal departments.
- **Services:** External service providers such as supply chains and vendors.

Keep This in Mind:

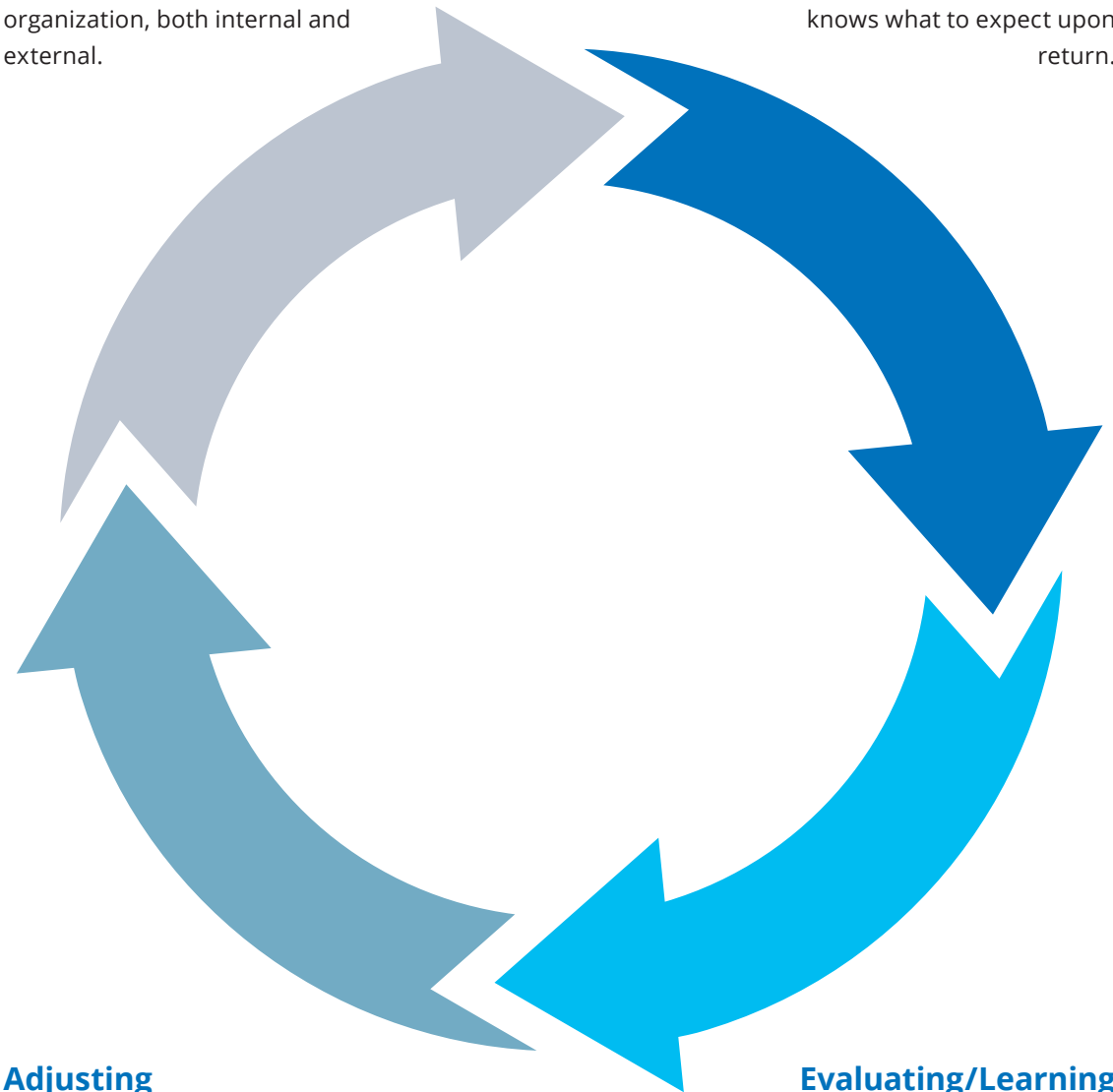
- ✓ Employ a learning cycle, leveraging data to inform the path forward for your organization.
- ✓ Maximize tools that provide feedback on employee sentiment and user experience as well as utilization and workforce analytics.
- ✓ Organize learnings into Now, Next, Later categories to prioritize and focus on the most impactful actions for your organization.
- ✓ Utilize “next” insights for medium term planning and “later” insights for long-term planning strategies.
- ✓ Use [“The Checklist”](#) at the end of each Phase to re-evaluate what must be changed and tweaked moving forward.

Planning

Communicate changes clearly and transparently across your organization, both internal and external.

Occupying

Be sure that the workplace is well-equipped and your team knows what to expect upon return.



Adjusting

Put your findings to use and prepare to make any necessary changes as your team adjusts.

Evaluating/Learning

Use qualitative and quantitative methods to check in on operations and morale.

PHASE ONE: AN OVERVIEW

During Phase One, real-time action and adjustment are paramount.

People



Leadership

- Stay current on evolving guidelines and assess the impact on your organization.
- Know your organization's limits for managing and processing change.
- Anticipate the concerns of your employees.

Workforce

- Assess physical vs. remote presence.
- Stagger any planned return to the physical workplace to address safety, comfort, and risk level.

Place



Building

- Work with building management to keep personnel apprised of new protocols.

Workplace

- Reconfigure the office to support health and make all personnel aware of new protocols.
- Support social distancing through physical space and addition of wayfinding signage.

Partners



Partners

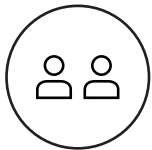
- Engage partners across departments for a thorough and holistic approach to all issues.

Services

- Assess supply chains for gaps and keep communication lines open with all current vendors.
- Support necessary technologies.

Phase One: Best Practices

Lean In.



- ✓ **Prioritize and address your organization's immediate needs.** Begin to focus on your transition back to the workplace.
- ✓ Stay current on evolving guidelines, protocols and requirements. **Have a plan in place** to assess how these protocols will impact your organization.
- ✓ **Know your organization's limits** for managing and processing change.
- ✓ Support the expectation of modified behavior through **physical and wayfinding signage** additions.
- ✓ Be proactive in engaging with the workforce and partners; anticipate the concerns and **communicate with transparency and frequency.**
- ✓ **Be thoughtful** in what you are doing next. Consider the following:
 - Workforce return strategy in waves.
 - Workplace changes to support your re-opening that enable social distancing.
 - Updating and revisiting policies and procedures to keep teams and individuals connected and feeling comfortable.
 - Support necessary technologies.

Phase One: People

When thinking about people, you should focus on the evolving guidelines, protocols and requirements that must be followed. Your workforce will return slowly, and you must know the limits for managing and processing change.



For Leadership:



COMMUNICATE FREQUENTLY

- Associate concerns over health + safety.
- Repopulation plan.
- Workplace and workstyle flexibility.
- Develop a communication plan to ensure regular updates.



DEFINE CULTURE

- Care packages for employees.
- Regular pulse checks on employee sentiment through feedback mechanisms.
- “Checking on you” options for managers.



SUPPORT NECESSARY TECHNOLOGY

- Virtual and digital channels for business and social interaction.
- Model behaviors using video tools to share updates/communicate.

For Workforce:



DEFINE WHO COMES BACK & WHEN

- Physical presence required vs. remote presence.
- Staggered opportunities for remote workers to engage with office culture.
- Repopulate in waves.
- Stagger occupancy to reduce congestion and touch points.
- No higher than 50% occupancy* (follow local city and state ordinances).



DETERMINE EXPECTED PROTOCOLS

- Online options for training and certification.
- Appropriate expectations for PPE.
- Support employee concerns through choice and flexibility of workspace.

Phase One: Place

When thinking about place you must support physical space and wayfinding changes with communication before employees return.



In Your Building:

- ✓ **ADDRESS ACCESS CONTROLS**
 - Ingress and egress of the building.
 - Traveling within the building.
- ✓ **UNDERSTAND VISITOR AND RECEPTION PROCEDURES**
 - [Visitor Access protocols and expectations \(page 12\).](#)
- ✓ **UNDERSTAND COMMUNITY SPACE PROCEDURES**
 - New operating hours and occupancy limits.
 - Sanitation and/or PPE expectations of tenants using these spaces. **UNDERSTAND**
- ✓ **HYGIENE AND CLEANING PROCEDURES**
 - Building provided sanitizing products, locations, and how to request refills.
 - Expectations of tenant space cleaning.
 - Changes to cleaning schedules and/or levels.

For Your Workplace:

- ✓ **ADDRESS DENSITY THAT IS NOT ALIGNED WITH SOCIAL DISTANCING PROTOCOLS**
 - Maintain >6 of distance.
 - Limits in collaboration and community spaces.
 - Highlight traffic flow patterns with signage/floor markings.
- ✓ **ENCOURAGE SANITATION PRACTICES**
 - Deploy sanitation supplies (wipes, hand sanitizer).
 - PPE protocols and SOP's.
- ✓ **DEVELOP PROTOCOLS FOR SHARED AMENITIES, SERVICES, ACCESS, USAGE AND CLEANING**
 - Café, pantry/kitchen, mother's and wellness rooms, fitness centers, collaboration spaces.
 - Mail services, IT service hubs for equipment, EV parking.
 - Deploy signage as appropriate.

Phase One: Partners

When addressing partners it is important to update and revisit policies and procedures to keep teams and individuals connected and feeling safe.



Engaging Partners

- ✓ **INCORPORATE INTERNAL BUSINESS PARTNERS FOR A HOLISTIC RESPONSE.**
Work with HR/IT/Legal/Business Continuity/Security.
- ✓ **ENGAGE WITH FACILITY AND PROPERTY MANAGERS.**
Understand property protocols and key learnings from international counterparts.
- ✓ **ACCESS SUPPLY CHAIN FOR ANY GAPS/LONG LEAD TIMES FOR OFFICE AND SAFETY SUPPLIES.**
- ✓ **ENSURE SERVICE PROVIDERS ARE ALIGNED WITH ESTABLISHED PROTOCOLS.**

END OF PHASE ONE

Consider the following when you feel that you're nearing phase two:

Planning

- ✓ Did you keep lines of communication open across all channels?
- ✓ Did you consult partners across all departments when making plans to return to the workplace?
- ✓ Did you assess return scenarios in the context of business operations and people, place, and partners?

Occupying

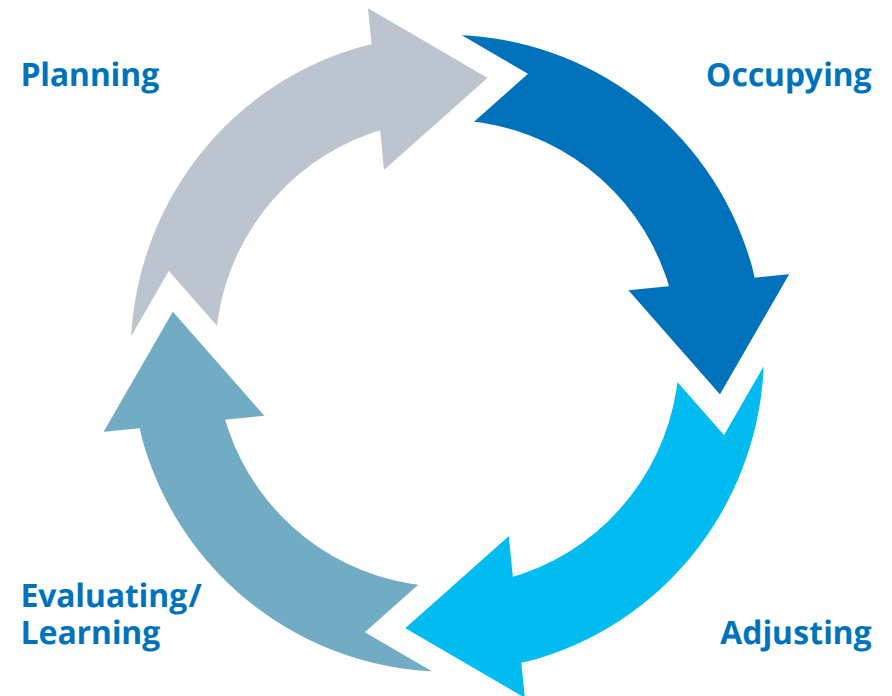
- ✓ Were all team members aware of updated expectations?
- ✓ Was the workplace well-equipped for new protocols?

Evaluating/Learning

- ✓ Did you use tools to collect employee feedback before and upon return to the office?
- ✓ Did you have to implement your procedures for any confirmed cases of COVID-19?

Adjusting

- ✓ Did you categorize learnings by Now, Next, Later adjustments to address the most urgent and impactful learnings first? How are you planning for and socializing any adjustments?



PHASE TWO: AN OVERVIEW

During Phase Two you are, learning, adjusting, and planning for what's next.

People



Leadership

- Reposition your task force to include evaluation and adjustment cycles based on data.

Workforce

- Transition from a “push” communication style to a more collaborative “push/pull” style.

Place



Building

- Stay up-to-date on shifting protocols.
- Consider what they mean for future capital investments.

Workplace

- Watch for emerging usage patterns that may indicate permanent changes.

Partners



Partners

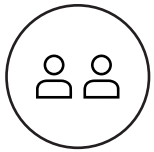
- Ensure departments are not siloed.
- Transition from reacting, to adjusting and sustaining.

Services

- Continue to be watchful of supply chains, collecting and aggregating data for future use.

Phase Two: Best Practices

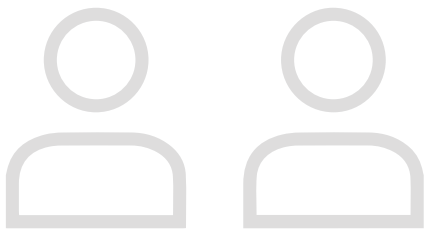
Get ready to shift.



- ✓ Reinforce behavior, physical environment and implement virtual tool shifts to **support physical distancing and safety protocols.**
- ✓ Leverage tools and technologies that provide data around workforce and workplace; **focus on those pivots that have “staying” power.**
- ✓ **Transition from “push” communications** aimed at setting expectations to “push/pull” communications that invite feedback.
- ✓ Reposition your taskforce to **include evaluation and adjustment cycles based on environment and workforce data**, in addition to action that supports health and safety.
- ✓ Ensure a degree of prioritization for future planning in this phase, informed by data, enabling the ability to **design a blueprint for real estate strategies in the long term.**

Phase Two: People

When thinking about people, open lines of communication are integral to understanding employee feedback, business impacts, and space design to support a new environment.



For Leadership:

- ✓ **(RE)COMMUNICATE**
 - Reinforce messages to support health and safety protocols.
 - Share regular updates regarding shifts to re-population, call to action, and/or protocols; invite associate feedback via digital platforms.
 - Be transparent around work-style, workplace and workplace.
- ✓ **(RE)DEFINE CULTURE**
 - Assess culture through employee feedback; use insights to understand any shifts to workforce and workplace decisions.
 - Maintain existing “check on you” practices.
 - Evaluate organizational culture.
- ✓ **CONTINUE TO SUPPORT NECESSARY TECHNOLOGY**
 - Assess technology tools and usage: what are necessary tools in the office vs. remote?
 - Investigate and evaluate technologies to support monitoring of spaces and operations to support health and safety protocols.

For Workforce:

- ✓ **FORECASTING FOR PRODUCTIVITY**
 - Assess physical workforce and begin to understand the what, where, and why of work product to inform technologies, operating models, and space design strategies.
 - Begin to understand if there are gaps for remote workers that should be mitigated for immediate or future planning.
- ✓ **OCCUPANCY AND SAFETY**
 - Alignment to support social distancing and infection control.
 - Assess continued/new areas of concern in relation to additional in-office headcount, mass transportation, health + safety protocols, and testing.
 - Anticipate and plan for seasonal infection cycles and their associated workforce impact.
 - Leverage learnings from international partners regarding return to office.
- ✓ **MAINTAIN AND SUPPORT EMPLOYEE CHOICE TO MITIGATE CONCERNS**

Phase Two: Place

When thinking about place, your organization should follow state and local regulations, landlord-backed changes, and employees adjusting to a redefined workplace. All of these shifting factors make Phase Two the “in between” phase.



In Your Building:



BE AWARE OF SHIFTS TO RE-OPENING PROTOCOLS DEFINED BY LANDLORD AND SHARE WITH YOUR WORKFORCE

- Access controls.
- Visitor/reception procedures.
- Community space procedures.
- Hygiene and cleaning procedures.



BE AWARE OF ANY INVESTMENTS BY THE LANDLORD TO INFORM YOUR INVESTMENTS AND REAL ESTATE DECISIONS

- Infrastructure/technologies to support contactless encounters and/or tracking and monitoring of spaces.
- Amenity/shared spaces strategies relative to operations and cost.
- Changes to Shared Service strategies that could impact availability and costs.

In Your Workplace:



DESIGN FOR THE “IN-BETWEEN PHASE”

- Revisit implemented physical environment shifts that support(ed) social distancing inclusive of density, desking/ seating arrangements, closed/ limited use spaces.
- Identify emerging spaces.



PLAN THE NEXT WORKPLACE

- Define desired cultural constructs to support people and work.
- Assess workplace space complexion to support evolved workforce models.
- Consider technologies that have multi-modality inclusive of user experience, provide contact-less engagements, monitor utilization, and support sanitation protocols.
- Evaluate current office portfolio through a multi-faceted lens with focus on people and work.



ENSURE HEALTH AND SAFETY

- Maintain sanitization protocols.
- Plan for evolved protocols in design strategies of physical space.

Phase Two: Partners

When thinking about partners, consider them an integral part of your development team as you prepare for the “next” normal.



For Partners:



BREAK DOWN INTERNAL SILOS

- Develop a regular interaction model for internal business partners that are supporting behavior and protocol shifts with less focus on immediate crisis response.
- Understand shifts in business practices for partners that may require adjusted space needs to support new operating procedures/mandated protocols.



CAPITALIZE VENDOR PARTNERSHIPS

- Leverage partners for lessons and learning across geographies, industry segments, and client benchmarking.
- Aggregate thought leadership and tools to support transitions between time horizons.

END OF PHASE TWO

Consider the following when you feel that you're nearing phase three:

Planning

- ✓ Did you keep lines of communication open across all channels?
- ✓ Did you consult with partners when developing phase 2 plans from phase 1 learnings?
- ✓ Did you anticipate/plan for any employee impacts resulting from phase 1 learnings?
- ✓ Did you re-assess business operations and people, place, and partners based on phase 1 learnings?

Occupying

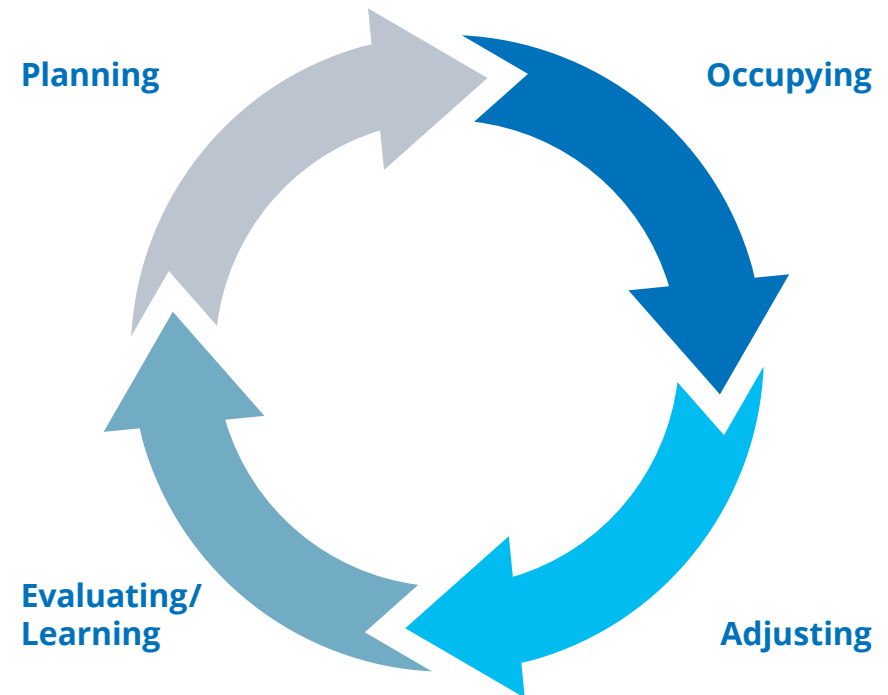
- ✓ Were all team members aware of any revised expectations from phase 1?
- ✓ Was the workplace well-equipped for any revised protocols?

Evaluating/Learning

- ✓ Did you plan or implement any changes based on employee feedback? How did you measure them?
- ✓ Did you have to make changes to your planned procedures for any confirmed cases of COVID-19?
- ✓ Have you used data sources to understand occupancy and how spaces and technology are being utilized?
- ✓ Have you assessed any impact on business processes, product developments, organizational culture, and/or team dynamics?

Adjusting

- ✓ Did you revisit your Now, Next, Later categories to address and prioritize your learnings and actions from phase 1?
- ✓ Did you expand your socialization and review process for any adjustments to account for business and/or employee impact?
- ✓ Have you considered how adjustments may affect capital and operational budget planning and execution?
- ✓ Are you using market data to inform any planned real estate changes?



LOOKING FORWARD TO PHASE THREE

A possible plan of action as we approach the “new normal.”



Get Ready to Shift

While the fluidity of our current landscape makes it impossible to determine exactly what Phase Three will look like, here are some likely action items you will need to take:

- Define experiences (physical and virtual) based on the evolution of engagements with people, place and partners. Considerations for behaviors that emerged and normalized in the activation phase, revised/enhanced government regulations, and a reimagined purpose for place should be evaluated.
- Operational practices and associated costs are more normalized for existing assets; continue to monitor and plan for shifts; include operations impacts as part of larger, capital investment.
- Refine investment strategies to align with necessary people and place experiences; evaluate physical and technological assets and implement strategic shifts to support refined experiences.



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