

Transforming a decades-old workplace to support a multigenerational workforce for years to come: A case study

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Holly Jeffers is a workplace strategist with IA Interior Architects based in Chicago. Starting out as an interior designer in 2003, Holly developed a passion for gathering data to support problem-solving and maximum efficiencies for her clients, which have included William Blair, Jet Aviation and Amica Insurance. Through each project, she is a steward for strategy from the initial concept to managing the change of

the workplace, documenting and tracking the process along the way. Holly graduated from the Illinois Institute of Art with a BFA in interior design.

ABSTRACT

A well-respected and traditional Chicago-based investment bank and asset management company expands well beyond its Midwestern roots to serve a growing clientele of high-net-worth individuals and institutions across the US, Europe and Asia. Assessing its future, the company's managers embrace a sweeping strategy to build a towering new headquarters that will cater not just to its growing client base but also its five generations of employees. Through a six-year process of thorough and innovative surveys, testing and design, William Blair & Company arrived at an award-winning office structure that has boosted its business footprint, employee culture and civic presence. Those leading the project say that internal communications and continuing measurement of the work environment, tools and changing needs of employees and clients are key to success.

Keywords: workplace, communications, mobile, data, testing, environment, open floor plan, workplace survey, measurable data



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INTRODUCTION

William Blair (WB) is a premier global boutique with expertise in investment banking, asset management and private wealth management. The 83-year-old privately held company embarked on a six-year journey in 2012 to transform its decades-old traditional workplace into a dynamic, sustainable work environment for the future. This paper is based on a presentation given by Erin Murray Butler of William Blair and Holly Jeffers of IA Interior Architects (IA) in March during the 2018 International Facility Management Association (IFMA) Conference held in Chicago. The presentation, 'Fit for Five', explained how WB's workplace and real estate management (WREM) team rigorously engaged its colleagues through open conversations and shared communications to support a successful transition to their new home. The human capital involved five generations of employees working in five different business groups. The goal was to support a unified workforce empowered to serve the company's evolving clientele for years to come. The lessons learned along the way underscored cultural values of the company — inclusion, listening, flexibility, collaboration — and created fresh business momentum for both staff and clients.

THE COMPANY

William Blair, a conservative financial institution serving high-net-worth clients, was founded in 1935. The organisation remained in its initial office in downtown Chicago for nearly 60 years. By 1994, with a staff of 400 employees, it had outgrown the space and moved into the top floors of 222 West Adams, a skyscraper in the heart of Chicago's financial district. By 2012 WB had outgrown that office too, with 1,200 employees in Chicago and 1,500 worldwide. The need to shape the future growth of the company prompted the six-year journey toward designing and transitioning to a new home at 150 North

Riverside. WB moved into a 54-storey glass tower a few blocks away as the anchor tenant during the summer of 2017. The move transformed the company's working environment and has been met with overwhelming positive reaction from management, staff, clients and prospects.

WB's managing partners began with a clear overall business goal: become the premier global 'boutique' for financial services for wealthy clients. This meant supporting each of its five business units: investment banking, asset management, equity research, sales and trading and private wealth management. Each group works differently with different client bases. The new home of WB would have to be 'fit for five' with equal excellence.

But just as important was the creation of a cutting-edge workplace for the company's five generations of professionals. These comprised the Silent Generation (born from 1925–45), Baby Boomers (1946–64), Generation X (1965–79), Gen Y or 'Millennials' (1980–95), and Generation Z (1996–2009). Each of these generational layers of colleagues brings talents, attitudes and needs that benefit the company's clients and colleagues. They also reflect generations of clients — both existing and future — looking at the company from the outside.

The company's leaders decided at the outset their new home required a nimble and functional space for all who worked there. They also wanted to look ahead to embrace all the changes to come. What would their current work force look like in ten years? What would their clients look like? What tools and procedures would have to change? They decided they would have to:

- Discover new ways for the workforce to collaborate and learn from each other;
- Foster generational integration in the workplace;
- Better understand partnering opportunities;
- Improve communications keeping in

mind the diversity of the staff and their clients.

WB leaders also saw the new building as an opportunity to rethink how it serves clients. In accordance with government regulations, the company's five business units are physically divided. Each has a different culture to match its clientele. Some groups work collaboratively. Other groups work very individually, ie a lot of head-down desk work. In addition, the company has offices across the US and in London, Frankfurt, Zurich and Sydney. The vision behind the move became one to enhance the brand both inside and outside the company.

Surveying and listening to its human capital — the core of the WB service business and what makes it tick — was a fundamental principle from day one.

To create a vast new space and ensure a successful transition, a solid understanding of how all the business units functioned day to day, minute to minute, was essential. But just as important was a detailed understanding from the individuals themselves of what worked and did not work within their teams. These needs created the overall process of the WREM team that was designated by the executive committee to design and execute the transition.

The key elements of that years-long process can be summed up in five words: strategy; test; design; communicate; measure.

These five might imply a timeline, step by step. But each element was actually used numerous times within the six-year process to adjust solutions so that 'the fit' worked at the optimal level for both staff and management. A closer look at each of these elements follows.

STRATEGY ELEMENTS

The journey begins

When the company began the journey in

2012, the goal was to determine the needs of our new workplace and look ahead, with 2025 a convenient and distant target. What would our markets look like then? What would the needs of our employees and clients be?

WB management recognised that the company's business units, while adhering to US financial regulations, needed to be able to interact in a more seamless manner. Breaking down a traditional 'silo' mentality was a priority. The company culture values mentoring, collaboration, collegiality and other positive behaviours that develop employees.

It was clear at the outset that the design of the new workplace should reinforce those values. But to find the design it was clear that WREM would need to communicate strategically — survey; discuss; explain; listen; collaborate; convince.

We found that the importance of communication cannot be overstated. This was vital given WB's objective of creating a collaborative work environment for five generations of employees, five generations of clients, five business units. Understanding all of their needs would be key to a workplace that fit business goals, staff performance, growth and retention.¹

At the start of the project in 2012, the employee breakdown by generations was: Silent Generation (2.4 per cent), Baby Boomers (25.4 per cent), Generation X (45.8 per cent) and Gen Y/Millennials (26.4 per cent). Generation Z was too young at the start of the journey to be employed. But WREM projected that by 2025, Gen Y and Gen Z would account for 56 per cent of WB employees, doubling their current presence. Such projections confirmed the importance of creating a work environment with feedback from all generations.²

WREM tried to be creative in surveying attitudes, including during a 'Bring Your Child to Work Day' event where it surveyed teens and younger kids for a glimpse into the Gen Z employees to come.

The executive committee's buy-in for thoroughly surveying employees was crucial.

The executive committee members (WB top senior leaders who guide the company's business strategy) represented only the Silent, Baby Boomer and Gen X generations. So, it was important, and sometimes challenging, for the group to grasp the meaning of the new workplace: they were creating a workplace for those coming up behind them. The human capital at the heart of their service business would change.

In the end, WB was being true to its 'listening' culture — and it paid off.

Before employee surveys, however, WREM got the executive committee approval of a workplace strategy that centered on three strategic concerns:

- **Business case:** Why are we doing these changes?;
- **Opportunity:** What can we achieve?;
- **Goals:** What are the measurable results?

The executive committee charged WREM with keeping these strategic concerns top of mind as the team proceeded. The success of the project would be evaluated against them.

The WREM team's level of engagement with the business leaders and workforce varied over time. Strategic communications were important for timeliness and effect. But the continuing prime objectives of the WREM team were to keep the business leaders informed, manage expectations, fuel excitement and keep the work force involved.

Researching and testing the transition strategy involved the following elements:

- **Data gathering:** Collecting data on how employees worked; what was working for them now?; what needed to change?; what does the future hold?;
- **Testing:** Based on data collected (eg feedback on new work stations, products, technologies) WB created a test lab, a

workspace to test drive by the various departments;

- **Design:** The feedback and testing informed the design concepts. But the need for consistency in the design *was an imperative* — floor plans, work stations (with flexibility based on business units needs), amenity stations, etc.;
- **Communications:** Multiple methods for communication were used (town halls, focus groups, emails, text messaging, other apps), to reach and stay engaged with all levels of employees, all the generations;
- **Measure:** Our post-occupancy survey measured results against preoccupancy surveys completed during the strategy phase. The preoccupancy surveys were done to understand the level of dissatisfaction among employees regarding working environment at the time. Post-occupancy also helped flag and prioritize future WREM projects such as technology updates.

Testing and surveys for the new building needs were influenced by the old space. Therefore, it is worthwhile to take a critical look at the old offices on 222 West Adams.

Critical look 222 West Adams

In 2012, WB had been in the same office for nearly 20 years. The office space, designed in the early 1990s, had many challenges for 21st century workers and clients as initial employee surveys made clear.

When WB moved into 222 West Adams in 1994, the company took over 130,000sq. ft. By the time of the 2017 move, WB was occupying more than 350,000sq. ft. Moreover, those work spaces were spread throughout the building: seven floors in the high rise, four floors in the low rise and two floors connecting the low-rise floors across a tower. Shuttle elevators, connecting WB floors, were used to transport employees and clients. The system was slow and antiquated — not the best impression for visitors or employees.

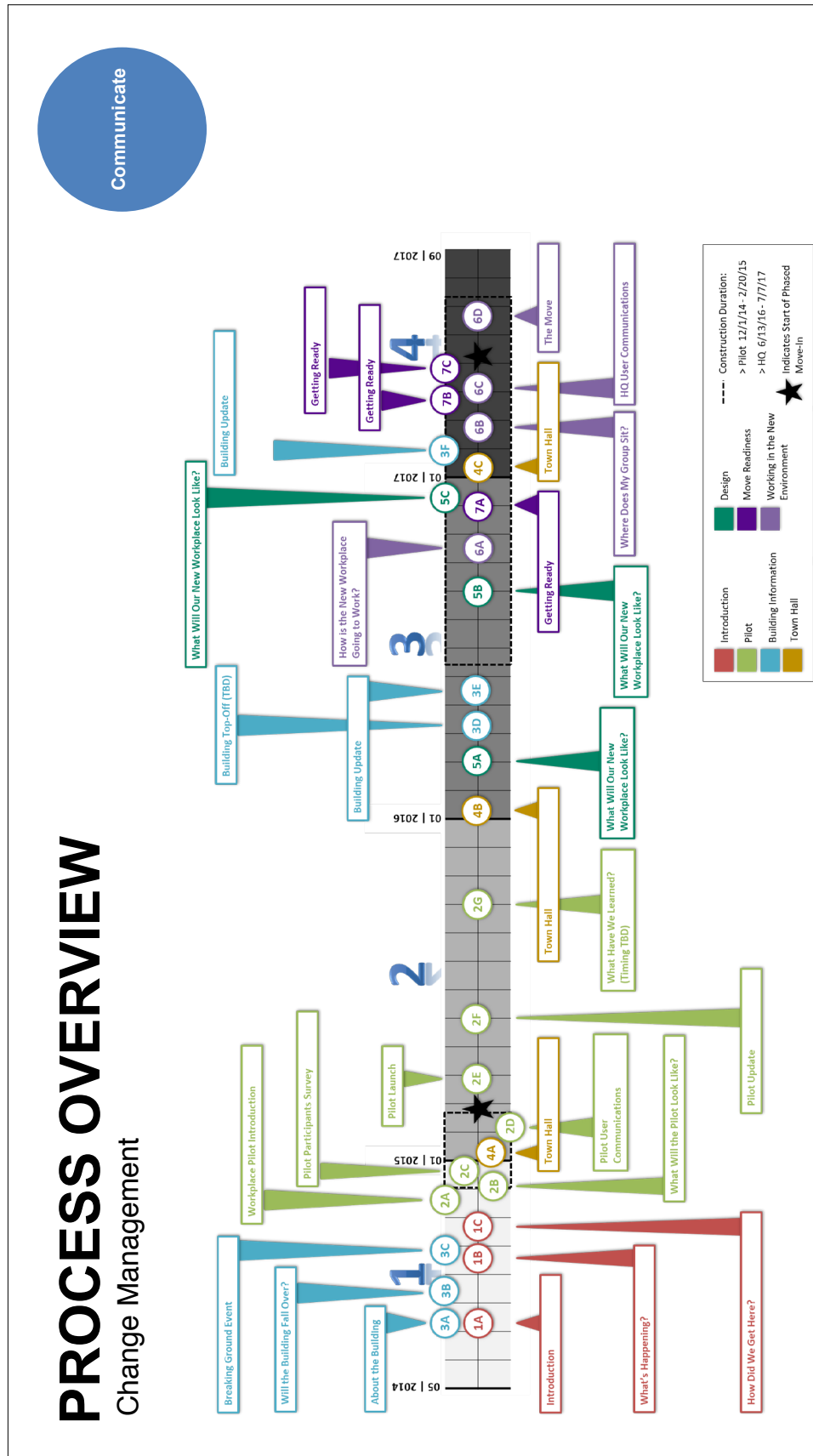


Figure 1 Open conversations and continual updates during the six-year project supported a successful transition.
Source: William Blair

There were four entrances into the building with four different reception desks. The company relied on the general security desks in the lobby to guide clients to the right floor for meetings and events.

Workspaces were dark with lots of wood, a favourite traditional interior for a conservative company. Private offices, filled with executive-sized desks, book shelves and credenzas, lined the perimeters of each floor. Office sizes varied, with some larger than 300sq. ft. Senior executives acquired larger offices as a status symbol.

Conference rooms were also dark and equipped with outdated audio-visual (AV) technology. Until 2010, one video conferencing cart went room to room to provide AV and meeting connections. In 2010, 30 conference rooms were converted to a high-end AV system with wall screens for client or colleague presentations. But challenges remained. Large monitors were placed at one end of conference tables to project visuals on screens at the opposite ends.

There was one lunchroom for the 1,200 employees, but it was seldom used. Coffee, some vending machines and a refrigerator were provided.

One assessment was obvious to WREM: shift the culture from very formal to more fluid and flexible. In 2012, some WB colleagues were counting private office ceiling tiles with the idea that you were more important based on ceiling tiles. WREM and senior leadership sought to move away from that mindset to thinking about the steps to people you work with. The employee's office was his or her world. 'This is my space'. The goal was to get employees thinking about the world being their office. You can work anywhere.

The old office setup fostered an attitude of employees being tethered to their desk — a feeling that 'if I'm not at my desk, I'm not working'. WREM and the senior leadership wanted people to know they could work anywhere in the office. How do we give

them the tools to do that? How can they be more mobile and work?³

WREM was especially interested in feedback from the five generations of employees regarding an open floor plan. While an open plan is designed to foster collaboration, many of the long-time employees had been in private offices for decades. The team did not want to make the same assumptions that other organisations had made in adopting an open floor plan without employee engagement. For WB to make a cultural shift, it was going to take employee support.⁴

What do people want or need — or resist?

During the strategy phase in 2012–14, communication was high with business leaders and the general work force. WREM actively sought their feedback, informed them on project progress and explained the process of transition. There were several key tools for fact gathering:

- *Designated department representative (DDR) interviews:* DDRs were the up-and-coming leaders identified in various departments, often Millennials or Gen Xers (70 per cent of the work force). They provided feedback on how they saw the company culture, challenges ahead and ideas to consider for training, hiring, retention and performance.

DDR insights were critical to the success of the project. It was an opportunity to engage in a different level of insight (compared with the executive committee and department heads). For the first time, WB was asking another layer of employees in all our departments to share their ideas. This information armed the WREM team with pertinent facts to share with the business leaders, which in many cases were different from what they were hearing from their staff;

- *'Bring Your Child to Work Day':* WREM took the opportunity to fashion a survey

of the next generation of workers (Gen Z) by engaging 54 youth (ages 8–13) attending the company's annual 'Bring Your Child to Work' festivities in April 2013. The goal was to gain an understanding of their thinking and values that will likely carry forward when they begin joining the company five to ten years later after the move project was completed.

The survey measured the responses of the youth through art: Where do you spend time with friends? Where do you have fun? Where do you like to go to find comfort? Several themes emerged. Friends, teamwork, physical activity, nature, technology and food were all features of their art. Comfort and opportunities for quiet time were also important.

One takeaway that paid dividends later was the importance of providing variety and choice for young workers. This reinforced the similar desires among employees based on the surveys and interviews conducted with them.

Employee Surveys

In 2013 and 2014, there were two company-wide surveys used to collect feedback on how people were spending their time at work. Did they work in teams or as individuals? What tools made them the most productive as individuals and as teams? How did they rate the current business environment?

These were online surveys using Survey Monkey. The e-mail blast was sent to employees from a WB e-mail address. The Q&A formats were developed so answers could be translated into measurable data.^{5,6}

The information would provide a barometer of the biggest pain points employees foresaw in moving and their readiness for change — providing leading ideas to build communications around going forward. The surveys were an equally important opportunity for employees' voices to be heard, to be part of forming a new workplace.

WB's consultant interior architects (IA) took the lead in gathering the data because it was critical that a neutral party collect the information.

In short: information was collected from 679 work style survey respondents; 54 focus group participants; 25 stakeholder interviews; 16 DDR interviews; 13 floors of space utilisation studies; five workplace effectiveness work session participants; and 54 youth during 'Bring Your Child to Work Day'.

WREM wanted to hear what employees had to say. The team wanted everyone to have a voice. The team wanted everyone to be heard. This was a key to success.

Vision statement and guiding principles as an anchor for transformation

All the survey information helped shape the project's guiding principles into a vision statement for the interior design in late 2014 before groundbreaking. The principles were essential: they guided the design process and building, acting as a constant reminder of where the company was headed. To a great extent, the principles kept the project on track.⁷

The vision and guiding principles statement was shared more than 100 times in formal presentations over the next three years. It was used to remind the executive committee of what we were doing; to update managers and employees of the building progress; to keep contractors focused on WB's goals. The lesson: always listen, but refer back to the guiding principles in making decisions.

Another value to distilling guiding principles into a vision statement was preparing for the possibility of a change in leadership. At the start of a multiyear project there may be expectations that everyone around the table at the beginning will be there at the end. But likely there will be changes.

Changes have challenges: budget and scheduling ramifications. So, vision and guiding principles, endorsed by the executive

A FEW SURVEY FINDINGS


 Strategy

- Majority are at their desk with work requiring concentration.
- Approximately 1/3 of their day is spent collaborating.
- A majority of meetings take place with 2-4 people.
- The amount of natural light at your desk supports health and well-being.
- New technologies are regularly integrated into the work place.
- Sightlines to colleagues are important.
- Ability to sit or stand at desk is important.
- Breakout space nearby.
- Large format LED screens are important.
- Acoustic privacy is important.

Figure 2 A summary of employee surveys taken in 2013, 2014.

Source: William Blair

committee, were key to the project staying on track. And they empowered the communications of WREM, probably the most critical piece of the project.

TESTING ELEMENTS

A living lab

Testing is invaluable to trial new concepts, environments and technologies before implementing them in any project. The larger the project, the more critical testing becomes. Today, the test phase can be accomplished by using virtual reality, furniture mockups or a living lab.⁸

Given the size and scope of the WB's transformation, the executive committee agreed in 2014 with WREM's recommendation to invest in a living lab. It had been 23 years since the company moved and

employee buy-in would be key to a successful transformation.

While the company typically spent a large portion of its budget on employee recruitment, talent, retention and training every year, this move was also a top priority. The executive committee wanted colleague participation and feedback on their future working environment, which would be used over the next 15–20 years.

The lab, referred to as the concept space, was built in a section of the existing offices at 222 West Adams. Over a 30-week period — almost eight months — teams of colleagues from nine departments worked in the concept space, rotating every three weeks, to test drive the designs.

They tested 21 different group spaces designed for collaborative or individual work. For individual offices, there were two different layouts and office sizes tested.

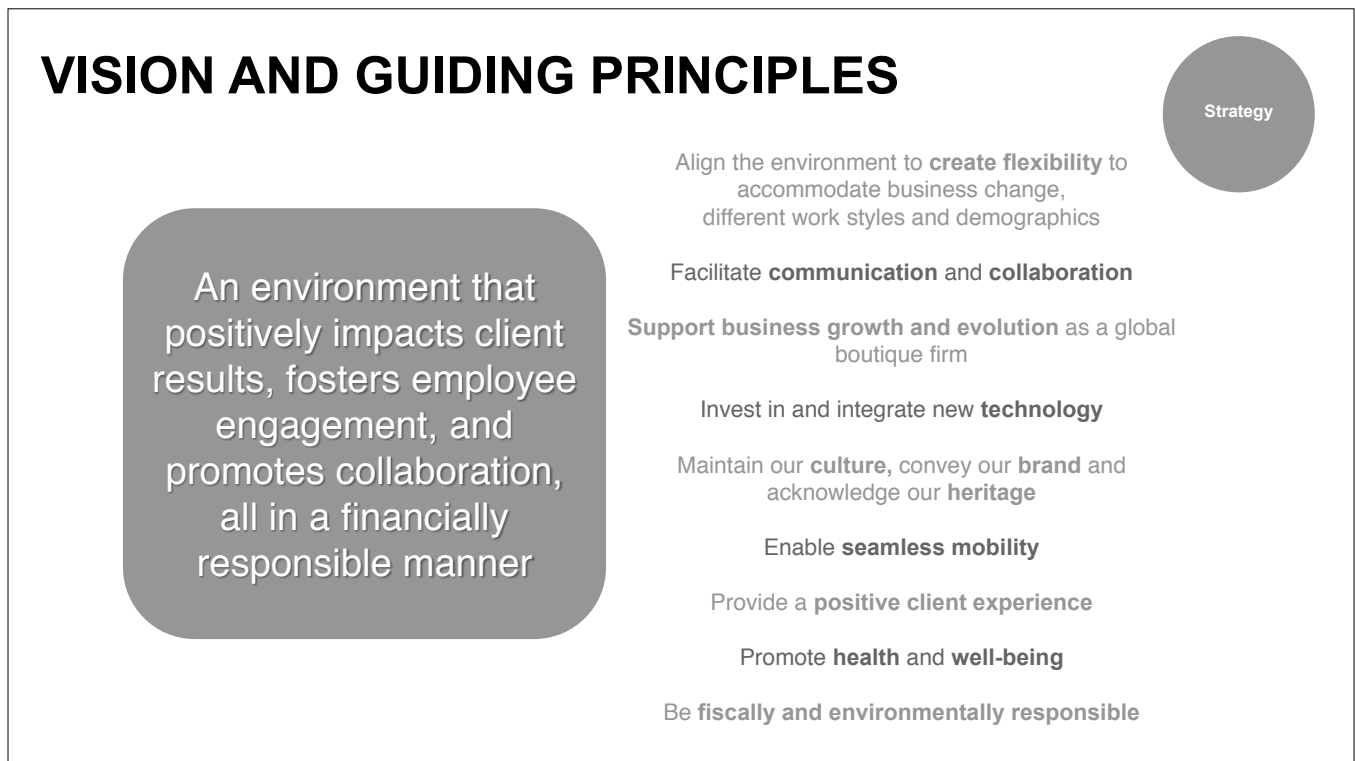


Figure 3 The vision statement and guiding principles served as constant reminders of the project's goals.
Source: William Blair

For the open floor plan, it was important to stretch expectations of personal space boundaries while introducing new collaboration areas.

Quiet rooms, or solo rooms, were created for employees to step away from the open floor plan with their laptops to do more 'heads down' work or take a call. Conference rooms equipped with the latest video technology and visuals were built and tested.

Separately, social spaces including lounge areas by windows and common tables with a beverage bar were trialled. An employee cafeteria was built with booth dining, lounge sofa areas, TV screens, microwaves and a grab-and-go food station.

To gather feedback and data during testing, a full-time consultant was hired to walk the space, chart employee activity by generation and ask questions: Which desk, table and

chair configuration enhanced team work? Which arrangement supported individual work? How did staff use the adjustable-height desk to stand while working? Did staff embrace the new audio visual and video conferencing capabilities? If not, why not? Did the sliding glass office door provide enough privacy?

Additionally, support staff — a facilities specialist and a tech support — worked in the concept space throughout the testing phase to ensure all employees and WB visitors understood how to use the new equipment and furniture.

Sensors were installed in shared areas to monitor space occupancy and use around the clock.

Traditional online surveys and follow-up focus groups were conducted following the testing periods to better understand participant experiences.

Texting was another survey method but not as popular as others. In the shared spaces of concept space three short questions were placed with a text code to rate the area.

DESIGN ELEMENTS

How the company worked together

The concept space feedback was voluminous, detailed and enthusiastic. The WREM team turned that feedback along with employee surveys into a tangible design guideline. The two-way conversations with staff and data collected ultimately made the transition into WB's new global headquarters more exciting and much easier for employees to embrace.

Design consultant IA led the effort to shape the spaces and create work solutions. Not surprisingly, the data showed that each new generation had a stronger and stronger

desire to use technology and become more mobile in the work environment.

In the new headquarters, a LEED-Gold certified building on a 1.5-acre riverside park, WB is the anchor tenant with 13 floors plus options to grow out in future years. The floor designs are uniform with common areas for employees and clients to collaborate. Amenities are in the same fixed locations on each floor. Most floors have conference zones; shared central pantries with food vending, premium coffee dispensers and milk machines; wellness rooms and private mother's rooms.

The WB public security desk on the main floor sends visitors to two points of entry on floors 37 and 46. From June to December 2017, more than 10,000 guests visited the new office, double the company's previous guest list for the corresponding period a year earlier.

FINAL DESIGN

KEY ATTRIBUTES

- Acoustics
- Centralizing and consistently placing architecture on the floor
- Shared Amenities
- Consistent and enhanced technologies across all shared spaces
- Reflecting the culture in the look and feel

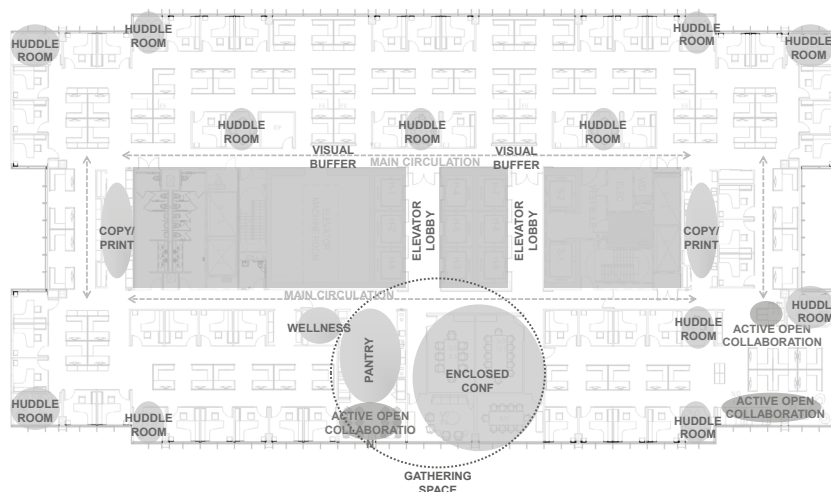


Figure 4 The final design was based on feedback from employee surveys and the living lab.

Source: William Blair

- *Reception areas:* There are two private reception areas, one on the 37th floor and another on the 46th conference floor. Both areas overlook the Chicago skyline. The reception desks are designed at angles to reflect the gentle curves of the Chicago River below. Linking some of the design elements and culture from the old building, eucalyptus wood paneling lines portions of the reception areas and some meeting and office spaces. Translucent tech screens are featured in the reception area of the conference centre to show off the space and brand to clients;
- *Work spaces:* Business leaders were presented a plan based on the feedback from employee surveys and concept space testing. Each floor plan included: 1) shared collaboration areas; 2) internal huddle rooms; 3) open collaboration spaces.

The workstation options featured flexible design modules: 1) heads-down focus; 2) heads-down hybrid focus; 3) collaboration hybrid. Each department selected the setup that best achieved its needs.⁹

Each department could accept the recommendations or select another setup that better addressed its needs. Ultimately, WB ended up with a mixed work space environment — private offices aligning the perimeter of the floors, huddle rooms and an open floor with modules with different configurations. All five generations were not ready to go to a full open plan. But office spaces were reduced from the company's previous headquarters and new work areas provided a more collaborative environment.

Each work station was designed to be 42sq. ft. That compared with six different work stations at the 222 West Adams building, ranging from 36 to 96sq. ft.

All private offices in the new building are the same size, 100sq. ft, versus a range of sizes in the old building of 150 to 300sq. ft and larger.

Given feedback of disruptive sound levels in the concept space due to the glass sliding doors, all offices and conference rooms were redesigned with a swing door.

Desk storage was designed based on employee work demands. More physical storage for those who preferred paper files versus electronic storage. All desks featured electric, adjustable-height work surfaces so employees had the choice of sitting or standing while working. Two, three or four monitors were mounted on each desk. Colleagues tested 14 different chairs that would be used throughout the office spaces and helped with the decision-making process.

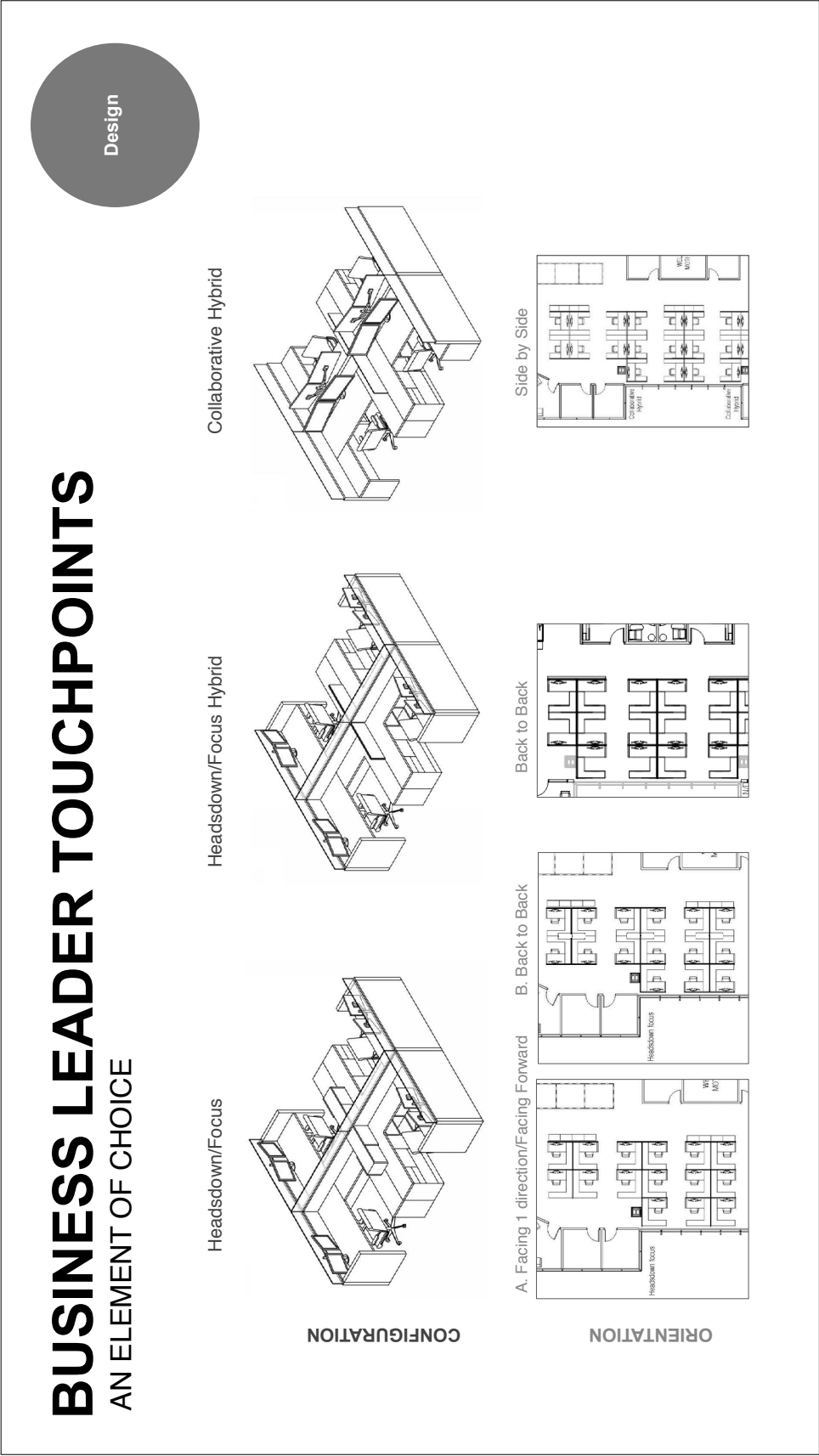
- *Conference rooms:* The new building houses more than 200 conference rooms (from solo to huddle to large meeting areas) versus 30 rooms in the old building. Wi-Fi is available everywhere. Conference rooms feature the latest audio-visual technology, high-end finishes on meeting tables, hidden marker boards. There are writable walls in all huddle areas.

The main client conference zones are on the 46th floor. The floor does not house any staff. Instead, there are 30 different rooms of various sizes to support clients' needs and encourage collaboration.

- *Other destination spaces:* The 35th floor auditorium features top-of-the-line video conferencing technology. It is important as a premier global boutique to be able to connect with colleagues around the world — in London, Frankfurt, Zurich, Sydney, New York, San Francisco, Boston and Atlanta.

The employee cafeteria, named 1935 to honour the year WB was founded, is on the 35th floor overlooking the Chicago River and city skyline. The area is surrounded by natural light and has become a destination stop for colleagues to meet or staff to host clients.

Every floor has a centralised pantry with food vending, premium coffee dispensers



and milk machines on every other floor. No one is more than a floor away from getting special amenities.

Making the move

The actual move, like everything else, needed careful planning and consultation. Departments were moved the eight blocks across the Chicago West Loop area over two months in June–July 2017.

Managing storage was key. A full year ahead of the move, WREM coordinated a paper purge. Electronic scanning of documents was pushed. The paper purge was met with mixed reviews as several departments had decades of paper documents.

With the support of the executive committee, WREM set moving quotas. The team moved 1,200 employees. Everyone in a private office received two packing crates. Everyone else received one crate. Period. No exceptions. The quota forced people to purge. They could not pack their artwork, fish tanks, surfboards or other personal items and bring them to the new building. Instead, staffers were encouraged to bring their personal items home. Once the move was completed they could bring their personal items back, if they fit.

COMMUNICATIONS

Two-way communications

The level of communications with each group — executive committee, department heads, DDRs, general employees — varied depending on the project state. WREM gauged the workforce understanding and engagement. If the team discovered new hot buttons, new things people were talking about, rumours around the project, new communications was developed around those topics. If employees understood a topic, communications would back off. The ultimate goal was keeping employees engaged throughout a long six-year process, which was difficult.

Early, during the *strategy phase*, communication was high with the senior leadership — executive committee members, department heads — to assess the company's needs and goals, foster support, create open channels to share information throughout the transformation.

Employee communication was high during the *strategy and testing phases*. Feedback from employees helped chart a path.

During the *design phase* the level of communication with the general employee population was toned down. The team had ample employee feedback following company-wide surveys and the 30-week concept space testing.

On the other hand, business leader communications stayed at a high level during the design phase to keep them apprised of decisions, budgets, timing. Communications was formalised with different groups and individuals inside and outside the company, divided into four groups: implementers, operations, transition stewards and developers.

- *Implementers*: Consisted of a high-level leadership team making core decisions especially related to budget and schedules with the core team. The core team represented most of the WREM team along with the designers, IA and the building landlord;
- *Operations*: The Operational-Advisory Team, referred to as OATS, consisted of the WREM project leader and the heads of HR, brand marketing communications, compliance, IT and finance. Bringing those group heads together was critical to the success of maintaining the overall strategy. Some were more engaged than others. But as part of the ongoing decision process — the buy-in factor — OATS was an important communications channel;
- *Transition stewards*: These people kept focused on the actual building-to-building transition, communicating updates on the



Figure 6 William Blair's work space in Chicago before moving into its new offices the summer of 2017.
Source: William Blair



Figure 7 William Blair's work space after moving into its new headquarters.
Source: William Blair

designs or building process and moving plans to the employees. The team included many input consultants (eg the general contractor, engineering consultants, security consultants, AV consultants), representatives from the executive committee and the five business units; and DDRs and designated 'transition ambassadors';

- *Developers*: Other parties that needed to be involved included workplace services (how will the place be managed once built, including the sustainability objectives to meet LEED certification) and consultants for security, IT strategy, health and wellness and brand integration.

A key to success was a designated WREM 'owner' for each group who reported to the WREM project manager. This made the matrix for communications and responsibility clear.

Most common methods of communications

Various forms of communications were used to connect with employees.

- *BlairPort*. For building and move updates, most employees followed WB's intranet system BlairPort. Since WREM initially posted building news on a specific section of BlairPort, referred to as the 'Microsite', staff became conditioned to checking it regularly. Touch screens for the Microsite were also posted in the concept space that allowed employees to comment, react and ask questions.

Initially, the Microsite provided high-level information about the new building, what it would look like, amenities planned, etc. Later, information about the concept space, including the testing and focus groups results,

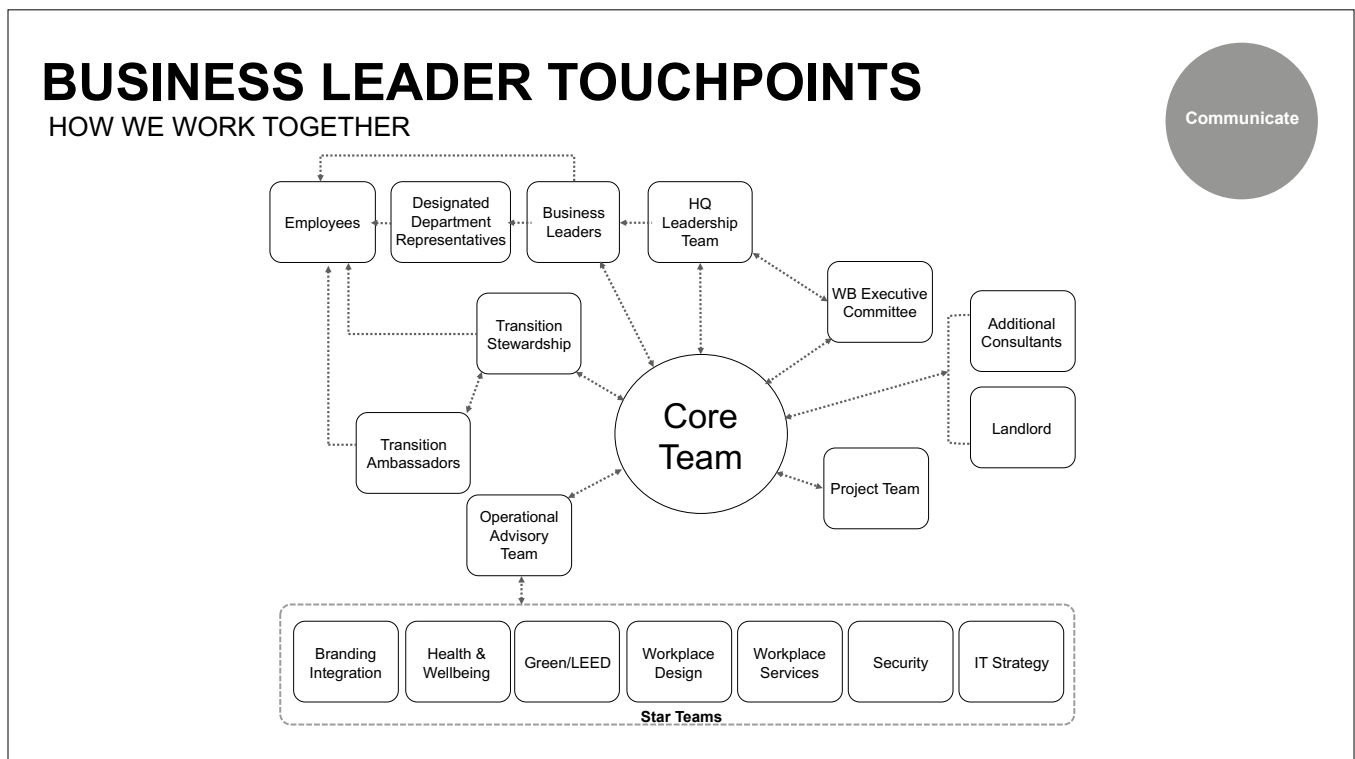


Figure 8 Communications was formalised with different groups and individuals inside and outside the firm.
Source: William Blair

was posted so employees knew what would and would not be included in the final office design.

- *Ongoing channels:* Building news was also disseminated at department leader meetings; by e-mail and printed documents; during conference calls and partner meetings;
- *Occasional channel:* Lunch-and-learns, company-wide town hall meetings, open houses, celebrations and building tours were other avenues used to update employees and keep them enthused about the project;
- *Information sessions:* Specific to each department move, meetings on how to use the AV equipment, amenities, hospitality services, etc. were held in the old building before the move and repeated in the new building after the move;
- *Move app:* Several weeks before the first department moved, an app was created to provide timely updates via employee smartphones. Surprisingly, it was the least popular communication method used by employees even among the millennial generation.

The move: A checklist

Protocols were put in place to gather and share moving information for employees and external contacts regarding security, connectivity, travel and parking for the new building.

Clients, utility companies and suppliers were notified of the move.

Moving materials were branded so employees could easily identify any must-have, how-to reference materials.

A FAQ sheet was developed. Initially it featured anticipated questions. But the FAQs list grew to include common questions employees asked during the moves.

Welcome packets were distributed to every employee on moving days. The packet described amenities, meeting spaces, food and dining options, the help desk phone

number and a coupon for free lunch in Cafeteria 1935.

Facility and tech support staff roamed the floor on moving day to answer questions and troubleshoot problems.

MEASURE

Move surveys

This was a six-year project and a great opportunity to compare expectations with outcomes.

- *Post-occupancy immediate survey:* Move surveys were conducted immediately after each department moved into its new space to gauge mood and rate both support and communications. WREM was particularly interested in learning which form of communications employees found most helpful to facilitate the move. The survey also included a write-in section to share ‘words of wisdom’ to the next group of colleagues moving into the building. WREM intentionally provided the section since the team discovered early on during the project that employees became irritated if they did not have an opportunity to share information;
- *Post-occupancy, 90-day survey:* There was a 90-day blackout period following the move where staffers could not make any changes to their office space. No rearranging of work stations, chairs; no additional storage units; the glass panel in each work station stayed; and so on. It was another critical factor to the success of the move. WREM wanted employees to get acclimated to their new spaces, see if they worked before making one-off changes. By the end of the blackout period, more than 90 per cent of employees were satisfied and kept their initial setup.¹⁰

After 90 days, WREM conducted a second post-move survey to measure the success of the transformation against the company’s

PROCESS OVERVIEW

Results

Measure

EXECUTIVE SUMMARY: Vision and Guiding Principles

An environment that positively impacts client collaboration, all in a

ALIGN THE ENVIRONMENT TO CREATE FLEXIBILITY TO ACCOMMODATE BUSINESS CHANGE, DIFFERENT WORK STYLES AND DEMOGRAPHICS

- 78% are satisfied (and 17% neutral) that the workplace enables choice in how, when and where they get their work done
- 82% agree (and 13% neutral) the adjustable height workspace helps them work more effectively

FACILITATE COMMUNICATION AND COLLABORATION

- 76% are satisfied (and 15% neutral) that the work environment facilitates timely decision making
- 62% are satisfied (and 32% neutral) with the environment facilitating timely decision making

SUPPORT BUSINESS GROWTH AND EVOLUTION AS A GLOBAL BOUTIQUE FIRM

- 83% are satisfied (and 12% neutral) that the workplace helps to attract talent
- 76% are satisfied (and 16% neutral) it will help retain talent

INVEST IN OUR BRAND

- 65% agree (and 25% neutral) that the workplace has a positive impact on the brand
- 73% agree (and 23% neutral) that the workplace has a positive impact on the brand

MAINTAIN OUR BRAND

- 76% are satisfied (and 15% neutral) that the work environment facilitates timely decision making
- 62% are satisfied (and 32% neutral) with the environment facilitating timely decision making

ENABLING

- 4% increase in being in the office
- 70% (and 16% many different)

EXECUTIVE SUMMARY: Key Findings

Overall, Satisfaction levels have increased, the most significant increases are noted below

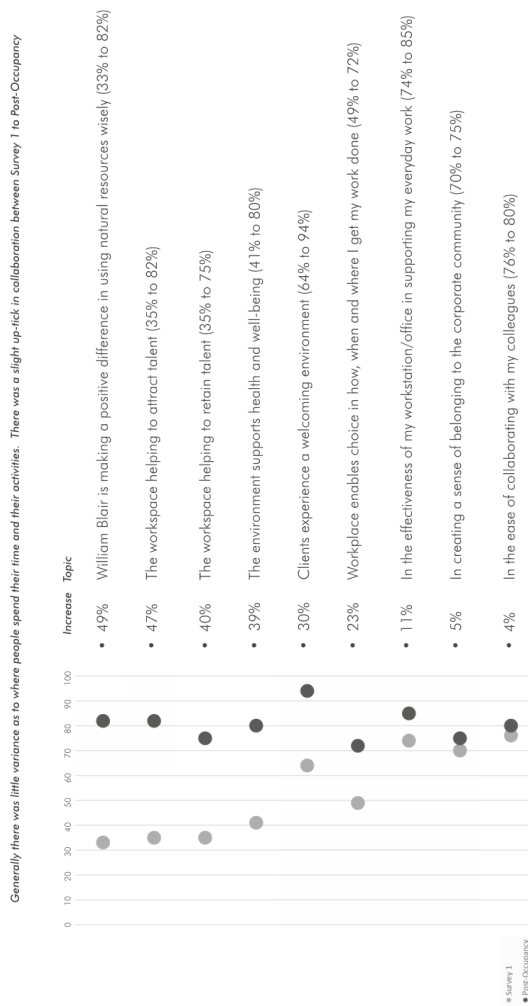


Figure 9 Employee expectations regarding the move were compared with their views following the move.
Source: William Blair

guiding principles and vision statement in late 2017. Those results were compared with the company's first employee survey taken in 2012. Overall, the work satisfaction level significantly increased with the biggest jumps in the physical setting, attracting and retaining talent and providing a welcoming environment for clients.

Looking ahead

Feedback takes a lot of time, energy and patience. But the learning process and information collected are invaluable. Colleagues have really good ideas. Big things matter. So, do little things.

In the post-occupancy survey, for example, one reoccurring comment was a complaint about the new cafeteria forks. People hated the forks. So, the company ordered new forks — it was a small, easy fix. But the lesson was that the team was listening to what people said about not only the forks, but every aspect of the journey. It made a visible difference in the final design and acceptance by a staff representing five generations.

WREM plans to continue measuring how the workforce perceives the work environment. Online surveys are a quick way to gather this feedback. Observation is another good way. It is really important that people have an opportunity to share their thoughts. Sometimes just listening to their issue allows them to get past it.

A FINAL WORD

The project illustrated the value of open, two-way communications with all the generations and business groups within WB for a successful transformation. You can never over-communicate. Employee engagement was critical but not easy to achieve. It was equally valuable to spend time with employees who had been with the company just three months, as well as for three years or 30 years. All had a

different insight on what WB was and should be.

What made this an extraordinary project was in addition to planning, designing and transitioning to a new global headquarters, WB was simultaneously developing new standards, protocols and processes for the company's future.

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