



The ISS 2020 Vision: New Ways of Working – The workplace of the future

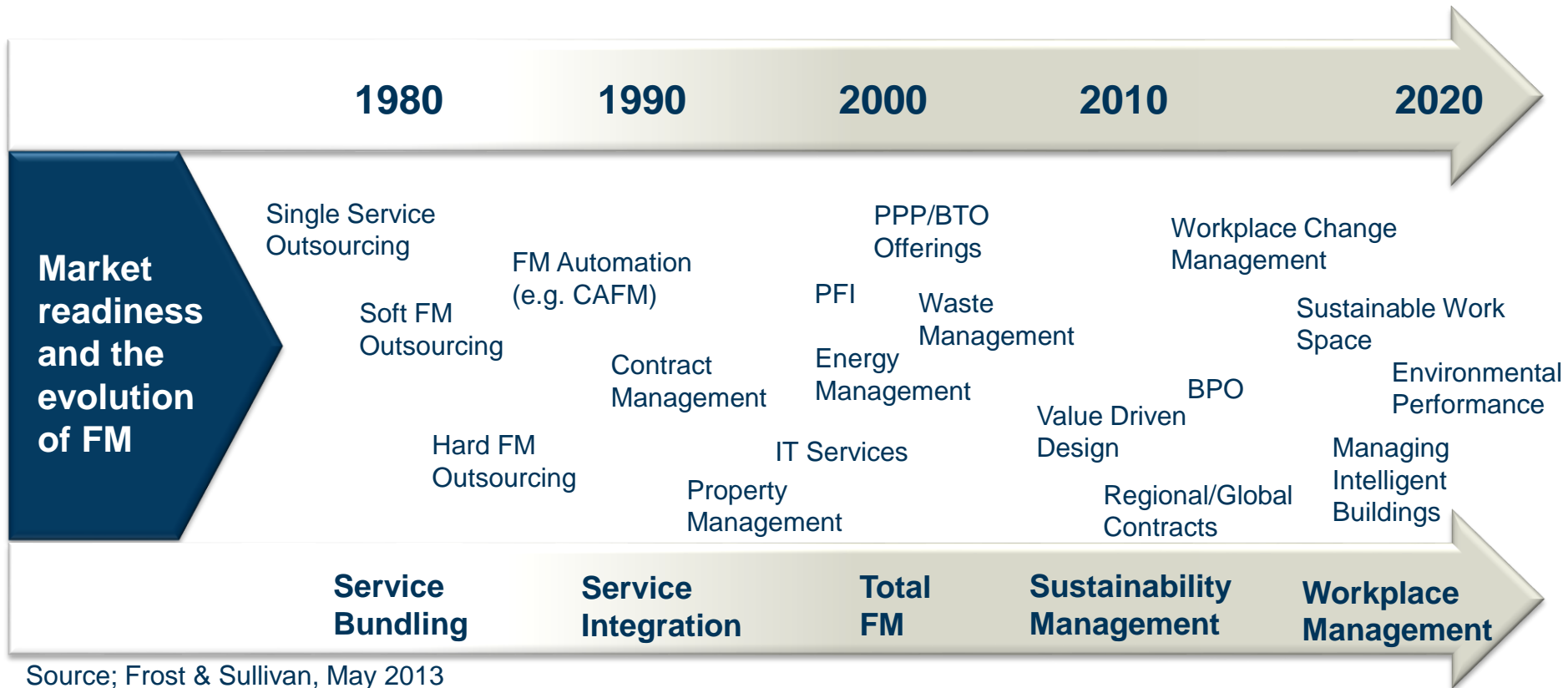
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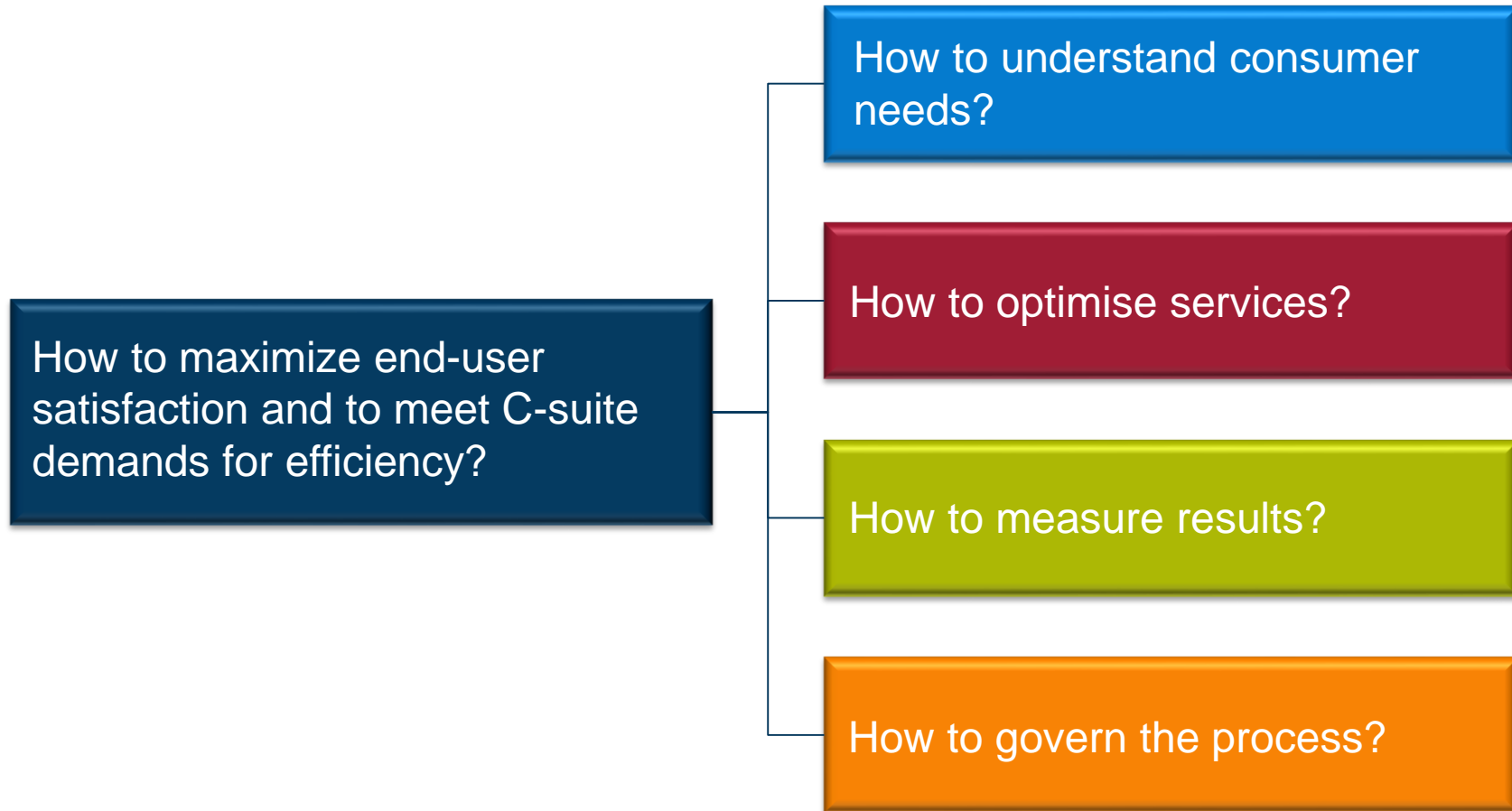


Work, the workplace and the
FM industry will be radically
different towards 2020...

FM industry's evolution...



FM will face some fundamental challenges...



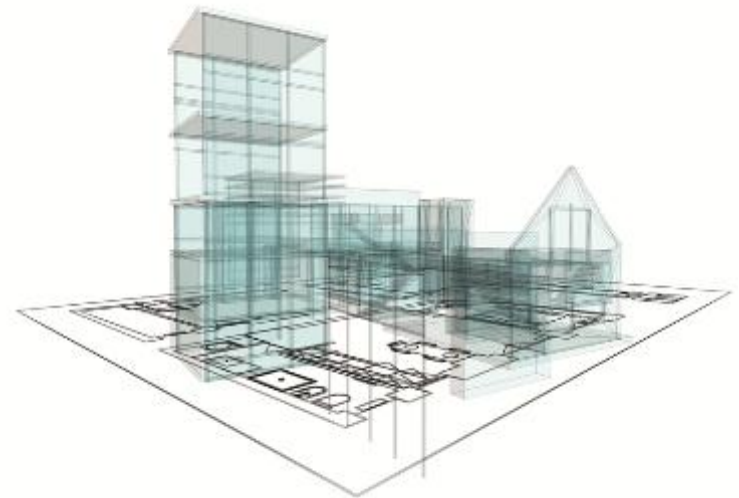
What drives experience – today and in the future?

The ISS 2020 Vision series:

**Scenarios for the future of the
Global FM Industry**

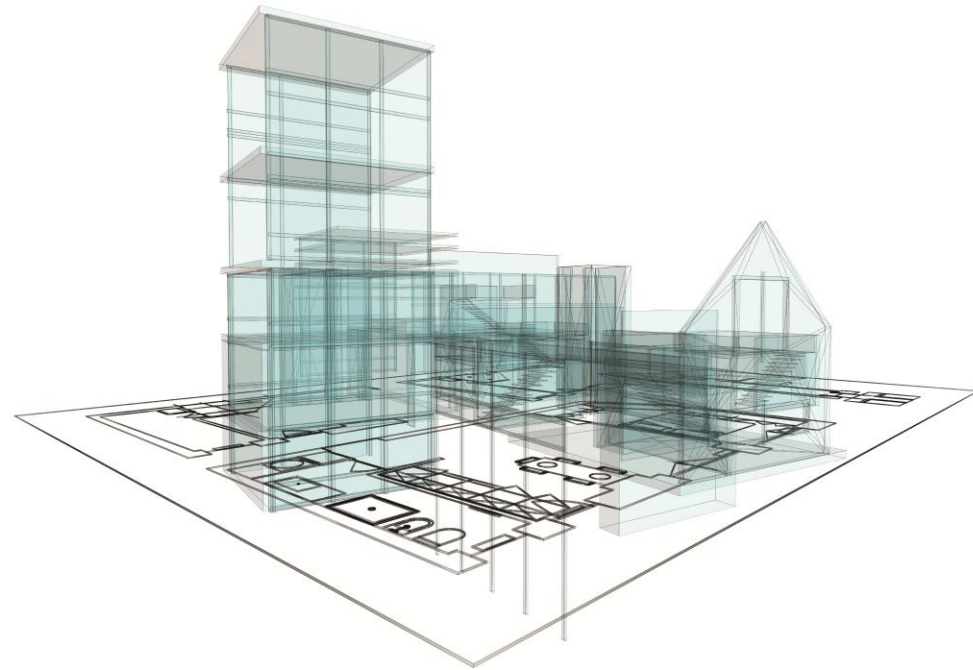


**New Ways of Working - the
workplace of the future**



Help organizations to create better workplaces

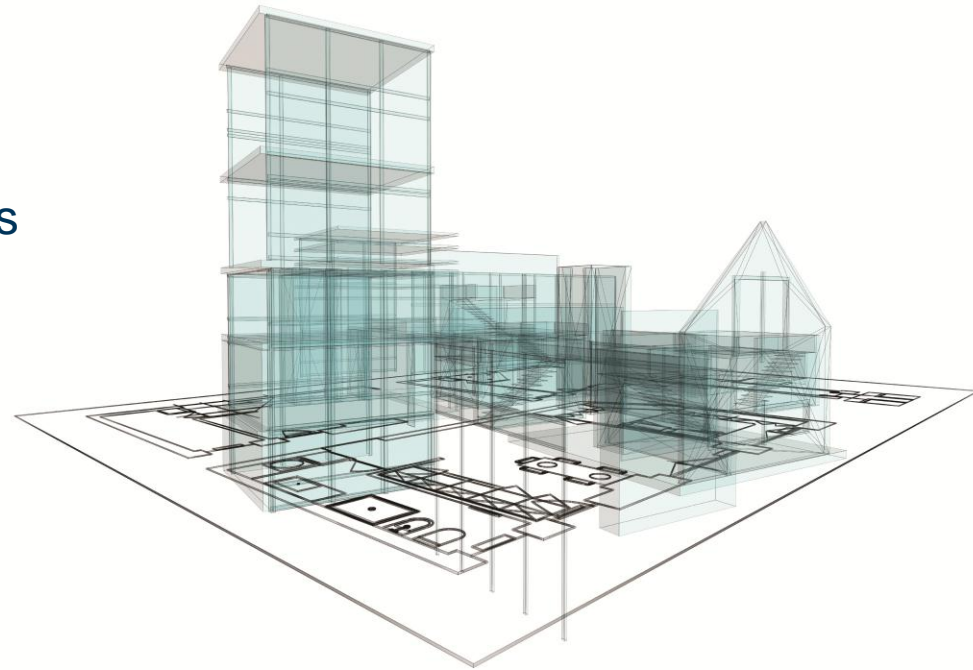
- Surveyed 613 FM experts from 56 countries
- Interviewed 17 subject matter experts from 9 countries
- Collected clients' insights during workshops in Austria, UK and Norway



The workplace will become an 'experience hub'

The future workplace of successful organizations are;

- Attractive environments where **employees will want** to work
- Helping organizations fulfill their strategies, deliver on brand promises and empower organizational culture
- Generating significant financial and environmental savings
- Showcasing what organizations can do for clients
- Helping organizations shape their future



Future challenges that FM providers must solve

Work

1. Paradigm shift increases the need for adaptation
2. Technology as the enabler of collaboration & change
3. Urban areas allow companies to leverage surroundings

Workforce

4. Polarization of the labor market
5. Increasing labor market diversity
6. Growing need to focus on employee well-being

Workplace

7. Personalization of the workspace
8. Sustainability and the future workplace

Workplace must address end-users' needs

- Work is not constrained to time and space
- Competitive advantage is gained from organizations' ability to shape behavior:
 - My behavior,
 - My colleagues' behavior,
 - Collaborating partners' behavior
- Increasing number of teams and workspaces are organized around limited, temporary and task-based projects
- Workplace strategies change often and quickly



Companies are responding to the challenge by

Less space

- M2 per employee fell from 20.9m2 – 16.1 m2 (2007-2012).
- If trend holds, 9,29 m2 by 2017

Less privacy

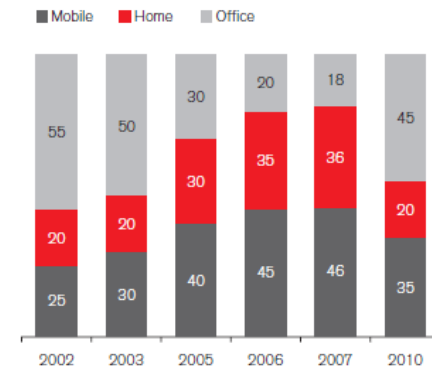
- Open office plans are becoming rule as companies seek
 - cost effectiveness
 - greater collaboration

Longer days

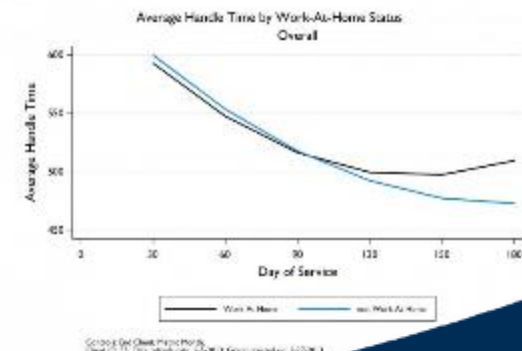
- Recession is causing people to work longer days, according to Towers Watson survey.

Source: What we've learned about the future of work, Gensler, 2012, Herman Miller, Coworking, Swarming, and the Agile Workplace, 2012. Chris Taylor, Here's Why You Should Work at Home — for 90 Days, Mashable, 2013.

Employees are returning to the office



Might not be a bad thing if they are cycled out every 90 days



For FM, it is important to be prepared to;

- Create a structured process to monitor, collect, analyze and act on user data (big data)
- Take action: Any change to workplace or service provision needs to be done quickly, cost-effectively and with little disruption
- Plan for relevant technical and non-technical contingencies
 - **Technical:** disruptions due to power outage, flood or other disruption
 - **Non technical:** Core organization has good chance of winning major contract and needs to hire new employees or vice versa



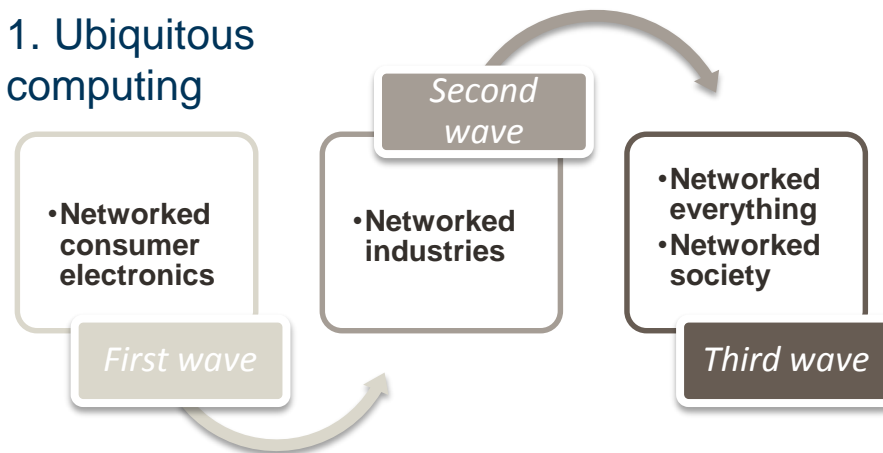
Example: Training & Contingency Planning



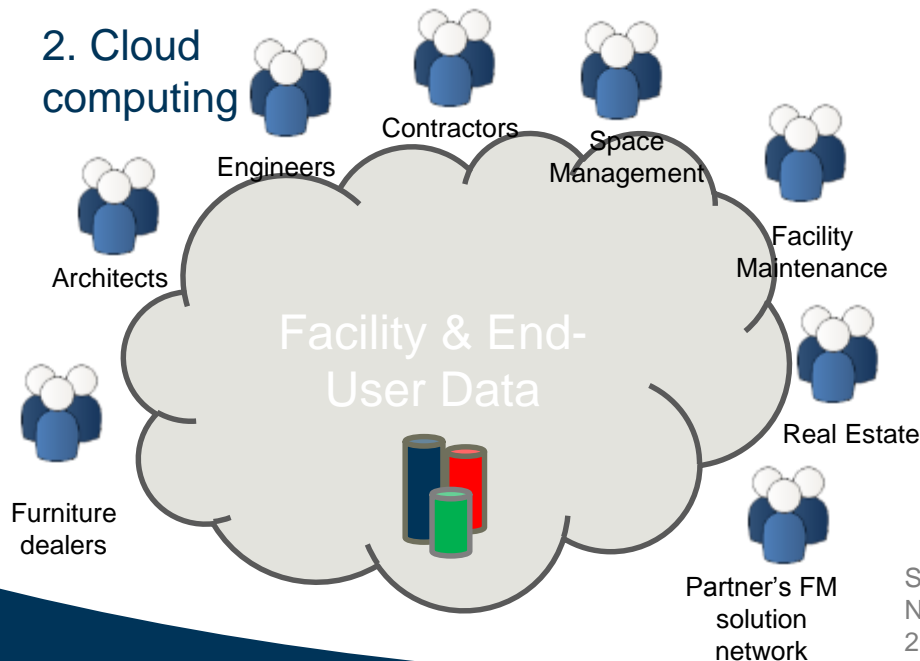
Source: Serious Gaming, FMJ, Sep/Oct 2013

Technology enables collaboration & change

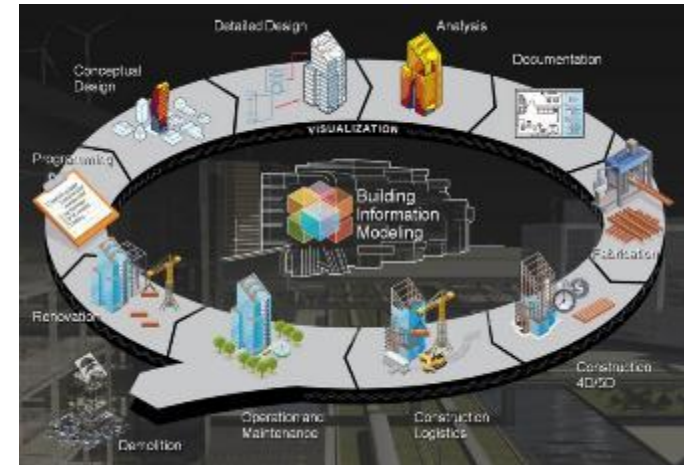
1. Ubiquitous computing



2. Cloud computing



3. Building Information modelling



4. BIG data



Source: Ericsson, 2011, ISS 2020 Vision: NWOW, 2013, FMJ, 2013, Buildpedia, 2013, CKR Interactive, 2014

Implications for the FM industry

Permits

Information

- FM managers will have real-time access on location
- Supervisors have real-time understanding of building operations

People management

- Field service personnel workflow optimization

New workplace strategies

- End-users enabled to use hotelling and activity-based
- FM providers can source services in innovative ways

New challenges

Reliability

- Data centers grow in importance. More redundancy, planning for disaster recovery sites

Security

- Physical data security (break-ins are surprisingly common)
- Make sure data policies are in order
- Firewalls
- Develop dynamic building access requirements

Flexibility

- FM flexibility must match core organization's

Growing importance of employee health and well-being



Source: Ron Goetzal et al. "Health Absence, Disability, and Presenteeism Cost Estimates," *Journal of Occupational and Environmental Medicine*, April 2004.

Growing importance of employee health and well-being

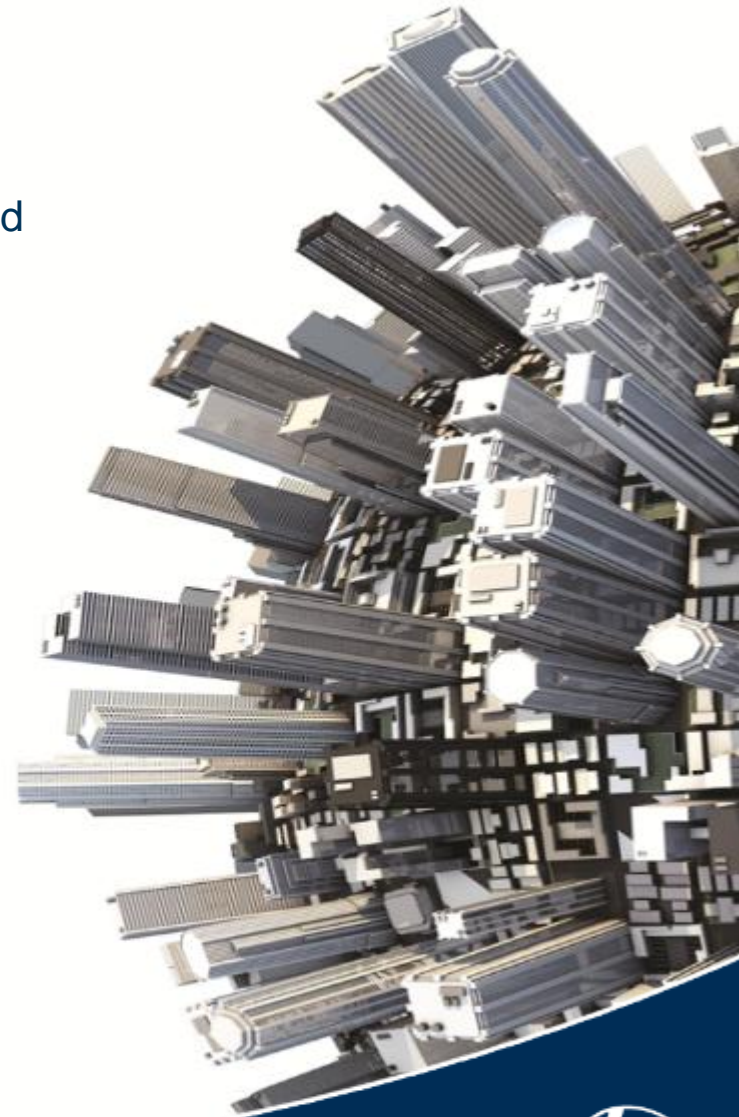
- Employee turnover, absenteeism and presenteeism affect all of our organizations' bottom lines
- Presenteeism costs US employers \$255 per employee per year
- New office designs and technologies can negatively impact users' health
- ISS can help companies reduce their risk exposure to such employee health issues as:
 - Allergies
 - Chronic pain
 - Diabetes
 - Stress

A workspace that needs a redesign



For FM, it is important to be prepared to;

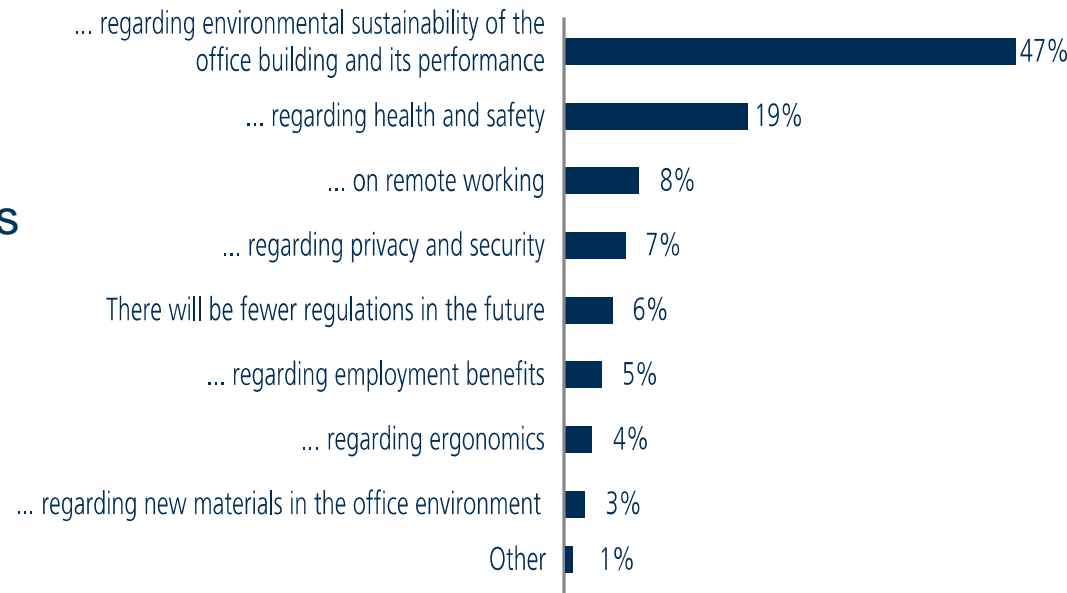
- Balance demands for cutting costs while ensuring well-being of employees
 - Monitor noise levels, odors and other irritants and act to reduce them
 - Develop healthy meal plans
- Work to reduce workplace irritation moments
 - Aid users in finding colleagues in flexible office environments
 - Combat ineffective meeting cultures
- Develop training programs to remind workers about correct ergonomic postures
- Develop services that accommodates work in private spaces or in 3rd workspaces



Sustainability remains a key challenge for the future

- Buildings represent 20 percent of energy consumption
- Surveyed FM experts expect more regulations concerning sustainability
- Improving building performance is moving towards changing tenant behavior
 - Change employee behavior
 - Location of buildings compared to where employee live now part of LEED certification
 - In buildings with multiple organizations as tenants, FM providers are moving towards collaborative solutions

What kind of regulations will influence the office design the most towards 2020?



Source: ISS 2020 Vision: NWOW, 2013

Free FM, in the workplace with prepared to print



Apple Cupertino (walkability score: 49)
and Facebook's HQ



Amazon's Seattle HQ (Walkability score
98, Transportation score 90)



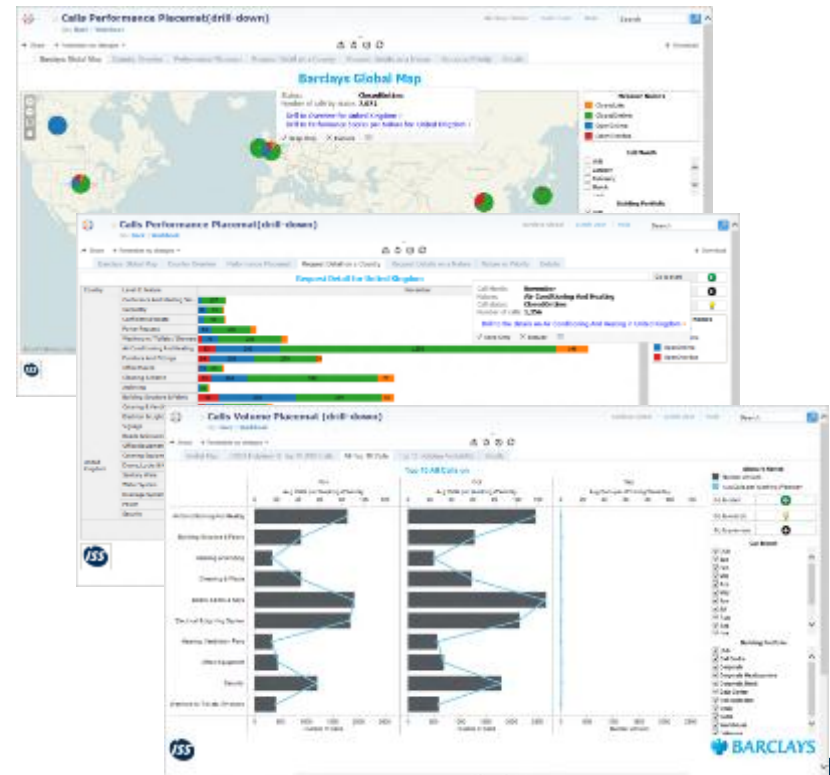
Source: Atlantic, 2013



For FM, it is important to be prepared to;

- Monitor, collect, and analyze energy, water and waste parameters against requirements and look to how organizations can continually improve:
 - Building design
 - Building management
 - Building maintenance
- Collect and analyze user behavior to improve sustainability profile
- Improve space management and rapidly configure and reconfigure flexible office spaces
- Utilize new technologies that improve utilization of assets:

Insight@ISS - analytics and reporting



Workplace will become an experience, not a facility

Focus will be to leverage the core organizations' ability to:

- Maximize utilization of assets
- Reduce risk and exposures
- Increase flexibility
- Create attractive workplaces to leverage strategy and change the organizational culture

Thereby the FM provider will have to:

- Engage customers/consumers (service experience)
- Become more extroverted and commercially oriented
- Seek alliances with others, including competitors
- Balance engineering with workplace psychology



The future role of the Facility Manager

FM must help clients achieve solutions to create a workplace, which will;

- Fulfill client's core strategy
- Fulfill client's brand and promotes a positive organizational culture
- Generate financial and environmental savings
- Create productive, efficient and fun workplaces where employees will want to work
- Help shape organization's future
- Showcase what the organization does for its clients



Acting today, shaping the future

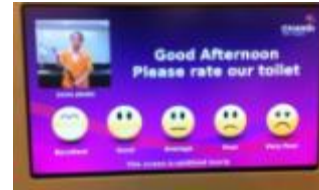
“Consumer” experience

Instant feedback from service employees – e.g. floor hosts, “*moment of truth*” and “temperature checks”

Systematic surveys (client, employee and consumers)

Segmentation and “user journeys” with focus groups (e.g. moves & change projects)

Beta-testing workplace solutions (e.g. “livelab”)



Acting today

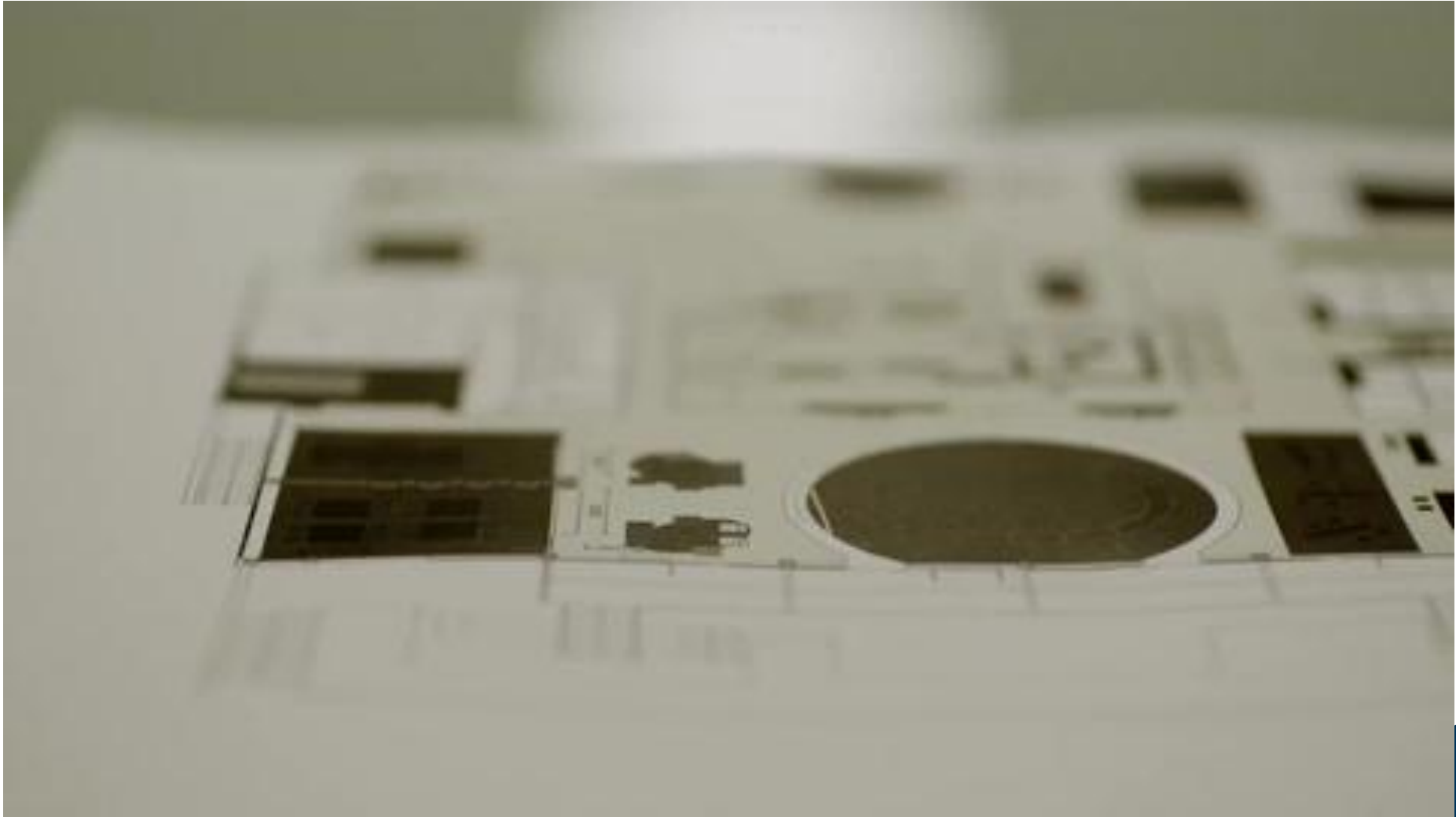


Shaping tomorrow

Adapting learnings at the new Global ISS HQ



Taking our own medicine....



Thank you for your attention!

"The future is not
something we enter.

The future is
something we create."

Leonard I. Sweet, writer, teacher & preacher.

