



Strategies For Growth In The Reimagined Workplace

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By Susan Etlinger, Altimeter
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EXECUTIVE SUMMARY

One big question for business in the early days of the pandemic was when and how we would return to the workplace. But, more than six months later, it's now evident that our idea of the "workplace" has changed markedly. This report, the first in a three-part series, explores the role of the distributed workplace as an engine for growth. It examines the key shifts we are seeing as a result of the COVID-19 pandemic and other macroeconomic, industry, design, and technology trends; identifies the key strategies leaders need to consider; and shares insights and strategies from leaders across a range of industries.

The next report in the series will focus on people; specifically, how the events of the past year have changed the ways we interact with customers, employees, and partners and how we can design digital experiences that foster preference and trust. Finally, the series will conclude with a look at the opportunities this unprecedented set of circumstances offers leaders—to grow and thrive even in the most dynamic and challenging circumstances.



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INTRODUCTION

On December 31, 2019, as people around the world prepared to ring in the New Year, the U.S. Centers for Disease Control and Prevention (CDC) became aware of a cluster of COVID-19 cases in China and began preparing reports for the Department of Health and Human Services (HHS).¹ Just over three months later, on March 8, Northern Italy placed more than 16 million residents in quarantine.² A few days after that, on March 13, President Trump issued the Proclamation on Declaring a National Emergency Concerning the Novel Coronavirus Disease (COVID-19) Outbreak.³

So began the global work-from-home experiment of 2020.

At first it seemed reasonable to assume, or simply hope, that the course of the pandemic would be relatively brief and linear. Businesses all over the world issued “Return to Work” guidelines and white papers. Consulting firms spun up new service offerings. Video conferencing exploded; Zoom use ballooned from approximately

10 million daily meeting participants in December 2019 to more than 300 million by April 2020.⁴ But the progression of COVID-19 — and the resulting changes to business processes and norms — has been anything but brief and linear.

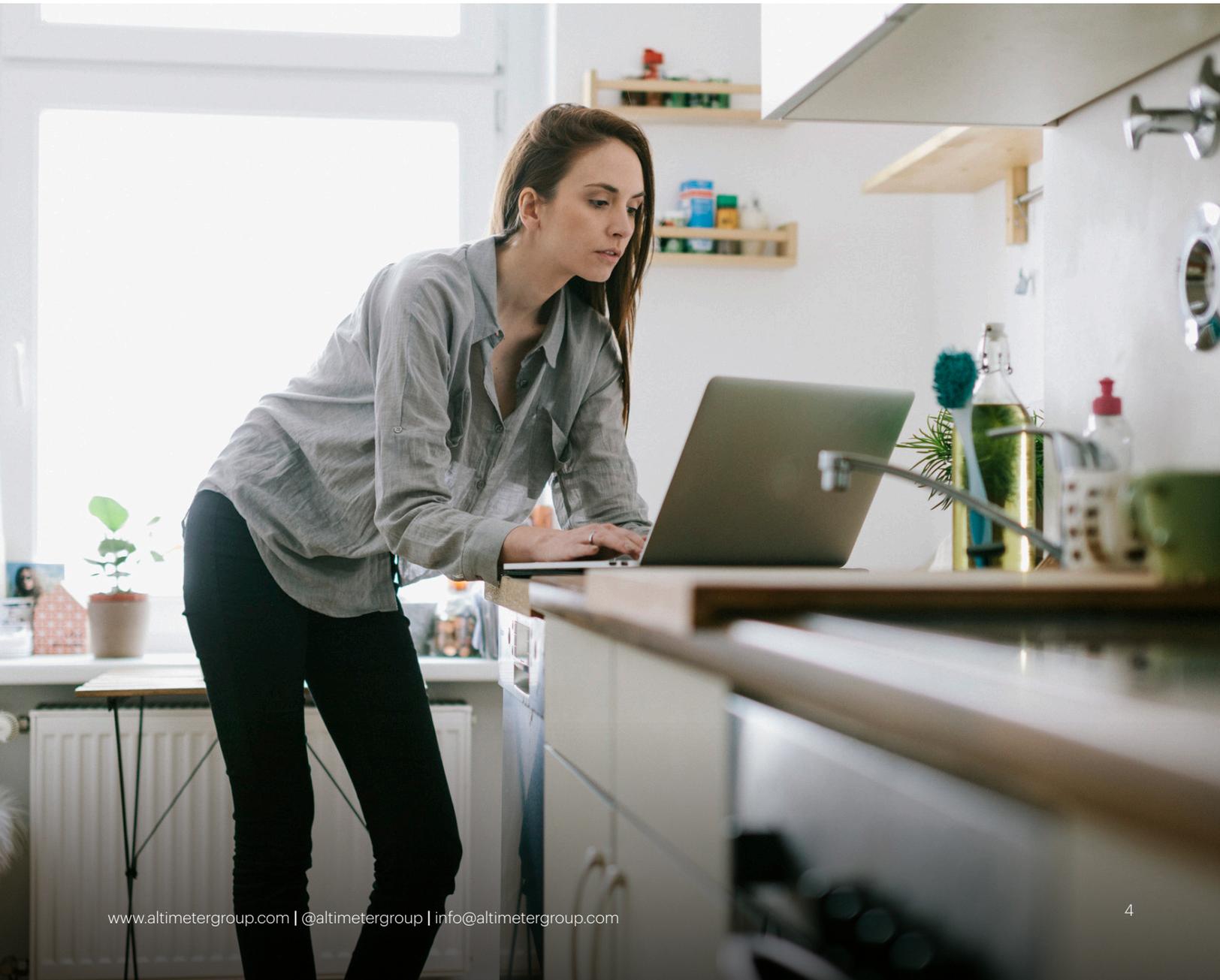
While COVID-19 certainly accelerated the shift to distributed work environments, it didn’t cause it. A study conducted by Switzerland-based IWG reported that, as of 2018, 70% of professionals worked remotely at least once per week, while 53% worked remotely for at least half of the week.⁵ So the convergence of the workplace and the home was already well established when COVID-19 appeared on the scene.

The difference is that before the pandemic, many people had the option (or the requirement) to work onsite. Working from home was an exception in many cases; now it’s a norm. Of course, the situation is highly variable based on a number of factors: where people are in the world, the type of work they do (office, construction, warehouse, technology, manufacturing, essential work), and their living situation, among other things.

It has become increasingly evident that these restrictive and unpredictable circumstances will continue for some time, and some of the changes they trigger will be long-lasting, if not permanent.

As a result, it no longer makes sense to think of a discrete “return to the workplace” in which we “get back to normal.” The workplace is no longer a specific, static location; rather, it’s a dynamic concept driven by shifting imperatives and circumstances.

The question now is how we reimagine the workplace to drive business value.





MAPPING THE IMPACTS

One thing that makes COVID-19 so challenging from a medical standpoint is that it is a novel virus. Generally speaking, human bodies have no natural immunity. And that lack of biological immunity has a downstream effect: People are behaving in largely unprecedented ways, which affects how they use physical environments.

Offices stand empty or operate with many fewer people. Construction sites are socially distanced. Homes are crowded with parents, children, roommates, and others vying for a quiet space to work and reliable connectivity. It's manageable for some, less so for others.

Impacts Are Highly Variable

The Remote Office Experience

While older, wealthier people can generally afford private home offices with high-speed Wi-Fi, other people accustomed to working from an office are constantly in search of a quiet place with a door

and decent connectivity. This can cause various downstream effects, stress and shame among them. “We have a couple of employees who won’t turn on their cameras because they’re embarrassed about their backgrounds,” said Randy Howder, Principal and Managing Director at Gensler. “One younger employee who has a lot of roommates was famously taking his Zoom calls from the bathroom because it was the only place in the house where he could have privacy.”

Geography also plays a huge part, not only in terms of the pandemic, but in terms of basic infrastructure. In Africa, for example, remote work is much harder to facilitate because many of the essentials that other regions take for granted — power, connectivity, access to a laptop, even food — don’t quite exist.

“When the pandemic began,” says Eghosa Omoigui, Founder and Managing General Partner at EchoVC, a technology venture capital firm with investments in Sub-Saharan Africa, “one of the things we did was to call all our portfolio company CEOs in Africa and



ask them to send a list of their staff. And then we bought diesel fuel and Telco data packages, paid for out of our own pockets, because we realized that for many of these employees who live in apartment buildings, the generators are only turned on from 7:00 PM to 7:00 AM. So working from home meant that there was probably not going to be any power during the day, and they didn't necessarily have the free cash to pay for mobile data packages or diesel fuel to power the generators.”

Traditional Indicators Are Out of Sync

We have also seen that many of the traditional indicators we rely on to help us understand the economy are at odds with each other. “At the beginning of the pandemic,” says Omoigui, “I was very concerned about the U.S. economy. I was concerned about the lack of anti-fragility in companies in the United States. And I was a little suspicious about whether or not the economy would be as resilient as people assumed.

“What’s interesting in retrospect is that we’ve had this weird conflation of a U.S. economy that is reeling and a stock market that is not. And so everybody’s sort of confused. If you’re looking at the U.S. stock market alone, you’re thinking, ‘Holy smoke; these guys are on fire.’ Meanwhile, you’ve got companies —

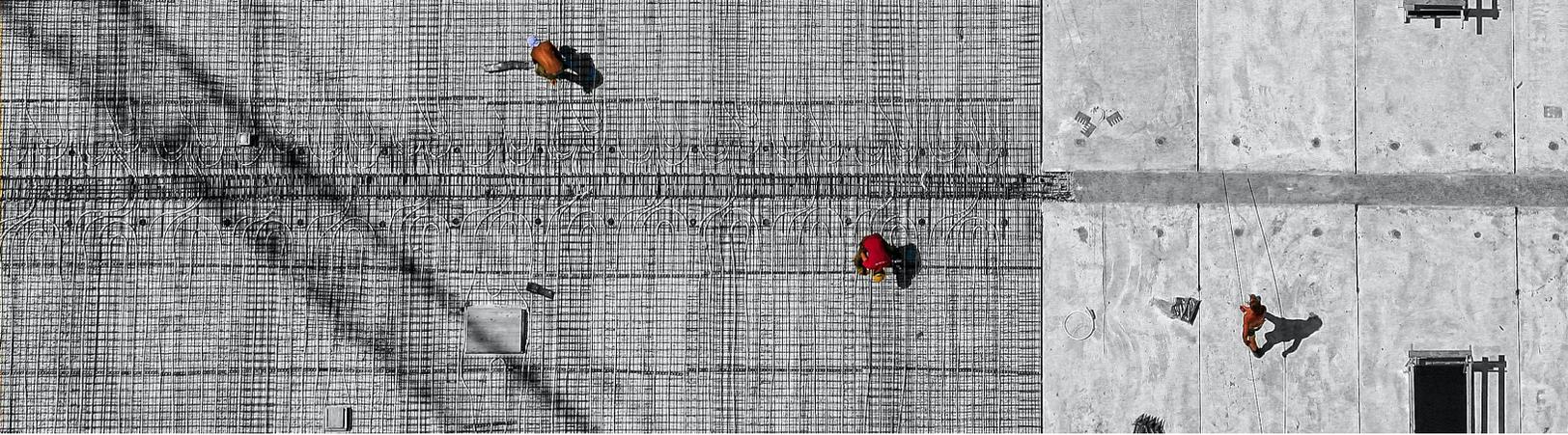
mainstay companies — not paying rent. You have creeping layoffs. You’ve got government intervention. It’s a weird mix. And our view was that the African companies that have always had to deal with chaos and disorder were just better built for bouncing back from this sort of disruption.”

Warehouses and Light Manufacturing

While many offices stand empty, this is by no means universal. Warehouses, fulfillment centers and light manufacturing facilities are operating 24X7, both to accommodate social-distancing requirements and to fulfill surging demand for, well, everything.

“When the pandemic hit,” says Michael Daniels, Senior Vice President at Kidder Mathews, a commercial real estate firm based in Seattle, Washington, “we were really worried. We didn’t know if it’d be another 2008. But the essential service sector stayed open, and anyone in warehousing — food, pharmaceuticals, and so on — is classified as essential services. So we’re seeing accelerated demand for online shopping and groceries, which increases demand for these companies to bolster their warehouse space.”

This shift from retail to logistics is also affecting the use of commercial space in the United States. A recent article in *The Wall Street Journal* reported that Amazon and



Simon Property Group, a shopping mall operator, were considering turning former Sears and J. C. Penney stores into fulfillment centers.⁶

Construction Sites

Impact in the construction industry has been mixed. “What we see in a traditional situation on the construction sites,” says Menno de Jonge, Director of Digital Construction at Royal BAM Group, “is that labor productivity has gone down because we had to apply social-distancing rules on site. But there is a difference between types of construction; for example, we don’t see a lot of decline in labor productivity with civil engineering projects, such as roads and bridges, because people are automatically able to keep their distance on the sites. But if you look at office buildings or schools or those kind of projects, it really has a big effect.”

De Jonge has also seen evidence that social distancing on a construction site can even have a positive impact. “Because people have to keep more distance from each other,” he explains, “they are not in each other’s way. So that has a positive effect on labor productivity.”

Understanding the Organizational Impacts

Putting Productivity Into Perspective

While there have always been questions about the productivity impact of remote work, this situation is fundamentally different. In the past, working remotely was the exception; the pandemic made it the norm. For that reason, there is no useful baseline against which to compare impact then and now; they simply don’t equate.

Some leaders were pleasantly surprised — then alarmed — by the high degree of productivity in the wake of the pandemic. “Everybody said that productivity went up during shelter-in-place,” said Prakash Kota, CIO at Autodesk, “but we are actually concerned in some cases. Are people burning themselves out? Because this is not a sprint; this is a marathon.”⁷

In fact, an August 2020 article in the *Harvard Business Review*, based on a rolling survey of approximately 680 white-collar workers, revealed that “in the weeks immediately after the lockdown began, only half of employees were able to maintain a 10-hour workday or less, whereas nearly 80% had been able to do so previously.”⁸



It's also clear that some functions lend themselves more easily to distributed work than others. "When we talk about things like design engineering and conceptual design," says Ari Almqvist, Group Vice President, Growth and Innovation at Moog, Inc., "virtual is even better and more flexible. But you need time for more team and relationship development as a foundation." Further, he adds, "Virtual work will create flexibility in terms of the people we can use in different situations. It's not about the engineer sitting next to you; it's about the best engineer for the job."

Accelerating Digital Adoption

Technology usage patterns have also changed since the beginning of the pandemic. According to research conducted by Altimeter, responding to COVID-19 was listed as a top driver of digital transformation in every country except China, where only 19% named it as a key factor. In contrast, 40% of interviewees in Germany named COVID-19 as a key factor in their digital-transformation journey.⁹

While the pandemic is generally understood to be accelerating adoption of cloud-based technologies and collaboration tools, another downstream effect has been the impact on supply chains and some artificial-intelligence systems. A May 2020 article in the *MIT*

Technology Review, "[Our Weird Behavior During the Pandemic Is Messing With AI Models](#)," illustrates the dizzying changes during a single week at the end of February: "When COVID-19 hit, we started buying things we'd never bought before. The shift was sudden: The mainstays of Amazon's top ten — phone cases, phone chargers, Lego — were knocked off the charts in just a few days" to be replaced by a familiar litany of post-COVID-19 staples: toilet paper, face masks, hand sanitizer, paper towels, and the like."

These behavioral changes affected business systems, "causing hiccups for the algorithms that run behind the scenes in inventory management, fraud detection, marketing, and more. Machine-learning models trained on normal human behavior are now finding that normal has changed, and some are no longer working as they should."

Human Impacts

People Can Adapt Quickly Under Duress

One unexpected effect of remote work was how quickly people managed to adjust to it. "I've been surprised at how well people have adapted, at least in the short term," says Ben Waber, President and Co-Founder at Humanyze, a workplace analytics company. "I was concerned because I was looking at previous work-from-home data, and it all



showed pretty consistent negative effects.” But, he continues, “it does appear the big difference is that everyone’s doing it at the same time. I think this gets back to some of that research in the past, where you were competing with an office.”

Another surprise was the speed at which even the most resistant adopted digital technologies. “In the past, I thought it would take more time for people to make a change,” says Royal BAM’S de Jonge. “But I learned from the pandemic that people can change easily from an analog to a digital way of working in a couple of days.”

Further, he adds, the speed at which people were able to adapt under duress presents an opportunity: to rethink our assumptions about how change management works so we can accelerate it even when we are not in a crisis situation. “People can make a fast change if it’s really needed,” he adds. “So we need to understand why.”

In-Person Connection Still Matters

The effects of the pandemic to date — longer workdays; the lack of reliable workspaces and tools; too much screen time and too little personal connection; unreliable connectivity and even power; the need to care for children and other relatives; economic hardships; not to mention loved ones who have become

ill or who we have lost — have forced us all into ways of working and coping that aren’t ultimately sustainable.

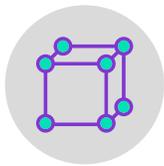
Social Distancing Will Affect Organizational Dynamics

Today, some locations that faced early COVID-19 surges are returning to a semblance of normalcy, some continue to isolate at home, and many fluctuate between the two stages, often on extremely short notice. While no one knows when the pandemic will end, there are a few clear lessons and imperatives.¹⁰

Spaces where people can congregate — offices, construction sites, schools, retail spaces, warehouses — need to be designed to reduce the risk of viral transmission. They need to be built with enough flexibility to accommodate rapid changes. And it all has to happen in a way that satisfies a range of critical health, financial, psychological, and organizational needs, as well as core life safety concerns, such as fire and natural disaster. Following are some of the most salient changes we can expect (see Figure 1).¹¹



Figure 1: What Has COVID-19 Changed?



Occupancy and Space Requirements



Route Planning



Risk Calculation



Speed and Flow

What has changed	Offices, retail stores, schools, and other venues can now accommodate fewer people.	The extra spacing required for safe distancing severely limits door traffic capacity and requires rethinking ways to measure one-way flow. Planners must minimize instances of people crossing in front of each other.	Focus on “life safety,” specifically fire protection and evacuation, expands to COVID-19 infection and transmission.	While assumptions about walking speeds will likely stay the same, enforced extra spacing between people will result in lower traffic flow rates.
What it means	Reduction in productivity per unit area means that space is more valuable than ever.	Planners need to consider one-way movement in most situations and incorporate partitions to facilitate safer routes within buildings.	While this may rebalance over time, it is by no means certain.	It takes longer for people to enter, exit, and move around buildings and built environments.

Source: Autodesk and Movement Strategies



One of the most challenging aspects of social distancing is its violation of social norms. In 1963, the anthropologist Edward Hall coined the term “proxemics” to describe the cultural expectations that govern how closely we stand when we communicate with each other.¹² This theory is best illustrated by the *Seinfeld* episode in which the friends are unnerved by Elaine’s new boyfriend, who is a “close talker.”¹³

At least for now, however, we’re living in a world of “far talkers.” Hall’s theory illustrates why enforcing a two-meter distance between people can feel awkward, if not outright alienating. Add the impact of wearing masks, says Jan Johnson, Vice President, Workplace Strategy at Allsteel, “and we’re missing all the visual cues that enlighten and inform communication. So between not being able to pick up all the facial cues and the formalized feeling that distance is going to create, even simple, social conversations are not going to be as satisfying as I think people really want them to be.”

While it is still too early to fully understand the long-term impacts of social distancing, Hall’s work suggests a call for leaders to consider ways to counteract these dynamics by fostering a sense of collegiality and comfort in workplace environments.

The Strategic Importance of “Weak Ties”

Another subtle but critically important side effect of isolating at home is the loss of “weak ties.” Weak ties, as defined by Stanford sociologist Mark S. Granovetter in 1973, refers to acquaintances or work colleagues with whom we don’t regularly interact.¹⁴ Conversely, “strong ties” refers to family members, friends, and close team members at work.

The loss of those unplanned interactions throughout our workday is actually quite meaningful, because, according to the *Harvard Business Review* study, “physical spaces cause people who don’t normally work together to connect accidentally, and that interaction sparks new ideas. There also tends to be less schmoozing and small talk among virtual workers, which research has shown leads to lower levels of trust. The decline in spontaneous communications and trust can undermine innovation and collaboration.”¹⁵

There are two key issues at play; the first is that detecting the impact of reduced spontaneous communication takes time. The second, says Humanyze’s Waber, who co-authored the study, is that, “I have seen zero companies — zero divisions, even — that have actually managed to maintain

these weaker ties at a level to even equal to pre-pandemic. I'm not saying it's not possible, but the issue in the medium to long term is that we are going to see more and more companies missing deadlines, missing milestones, coming up with fewer or just poor-quality products to serve business."

Some of these indications may already be evident, though, Waber cautions: "A lot of people are writing some of them off as, 'Oh, supply chains get messed up, or they're under financial strain,' which not to say those aren't true. But, I think more and more the actual cause is going to be the degradation of these ties. It's really hard to come back from that."

While informational meetings — updates, reports, training sessions — lend themselves reasonably well to remote work, spontaneous interactions are most at risk. "That's not to say you can't communicate with anyone on chat," says Waber, "but you're not going to do that in the same way. You're not going to schedule a Zoom call with the person who you talk to for five minutes by the coffee machine once a week. You won't do that because that sort of random small talk you don't do online. You don't do it in the same way."¹⁶





REIMAGINING THE WORKPLACE

The idea of adapting physical environments as a result of crisis, and specifically disease, isn't new. A recent article in *The New Yorker*, "How the Coronavirus Will Reshape Architecture," recounts the ways in which tuberculosis shaped Modernism in the early 20th Century "as a consequence of the fear of disease, a desire to eradicate dark rooms and dusty corners where bacteria lurk." The author argues that COVID-19 will have a similar effect: that "our collective experience of staying inside for months on end will influence architecture's near future."¹⁷

The question is: How exactly?

While health and safety are clearly of primary concern, there are other financial and human factors to consider. Modernism may have been inspired in part by the need to build lighter, airier environments, but the commercial real-estate market is driven by value metrics, such as price per square foot, which has influenced space allocation in

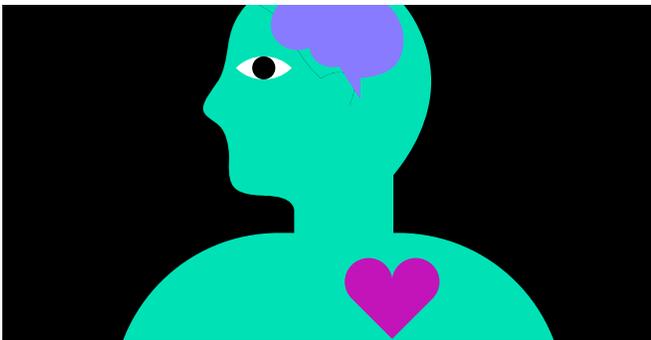
a way that may no longer meet our needs. Allsteel's Johnson describes three historic models that have driven organizational space allocation decisions:

- 1. Status.** Space allocation is based on power; the more senior the employee, the bigger the office, while lower-status employees sit in small cubicles. Professional services firms, with their iconic corner offices, were perhaps the best example.
- 2. Parity.** Space allocation is based on egalitarianism; everyone, no matter their role, has the same amount of space. This is extremely common in technology companies and was popularized in the 1980s by former Intel CEO Andy Grove, who sat in the same eight-by-eight cubicle as everyone else at Intel (and didn't have a reserved parking space).



3. Pluralism. Space allocation is dependent on the belief that each team should have a workspace that is conducive to its needs; this means deeply understanding the activities of each team and the space required to support their individual and group work processes.

“My preference,” says Johnson, “is pluralism, because it’s a much greater reflection of the range of activities actually happening in the organization. And the corollary it implies is that we need to invest in thoroughly understanding and designing for the nature of those activities, and in the physical adaptability to evolve over time as things change.”



Designing for Individual Wellbeing

As became evident in the first six months of the pandemic, the sudden shift from onsite to remote work caused significant and, in some cases, unprecedented challenges and health implications for employees. They have had to adapt their homes to become workplaces and schools — often for multiple

family members and without adequate supports. Meanwhile, employers have had to prepare for and address social distancing requirements and plan for their implications.

To assess employee wellbeing effectively requires that we approach it holistically. For this reason, it’s important to consider the onsite employee experience from both a psychological and a physical perspective. The U. S. National Council for Behavioral Health recently published a response to COVID-19 that explicitly addresses the traumatic effect of the pandemic.¹⁸ Although it was written with behavioral health professionals in mind, it offers a useful frame with which to consider employee wellbeing, focusing on human needs such as safety, trust and transparency, collaboration and mutuality, voice and choice, and peer support.

For example, the National Council recommends that leaders create and maintain structure, especially during turbulent times: “Keep your meetings, honor your staff by being punctual and predictable. Ensure that supervisors are checking in with staff often, asking how they are doing and what they need.”



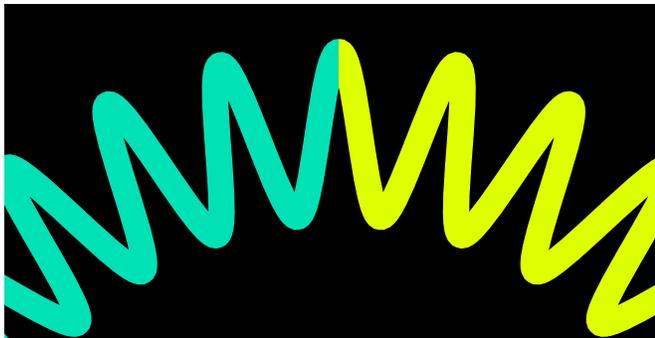
Designing for Value Creation

One of the most visible impacts of the pandemic was the sudden closure of some workplaces and surging demand for others. While demand for commercial space is likely to rebalance over time, many locations are unlikely to operate at their former capacity for the foreseeable future. “Our historic metrics — which have been oriented to cost and space — like square footage per employee — don’t make sense now,” says Johnson. “And they never reflected how the built environment contributes to value creation.”

If square footage per employee is not a useful way to think about value creation, what could be an alternative? Johnson believes the first step is to think of the workplace not simply as a static set of structures that house employees, but as a dynamic and distributed ecosystem that supports the primary activities of the organization. In this context, value creation

is a direct outgrowth of a needs assessment that directly ties space to business goals and organizational culture. In this way, offices could become more like social hubs and meeting centers rather than fixed locations for desk-based work, and include intentional efforts to strengthen social cohesion.

Ryan Anderson, VP of Digital Innovation at Herman Miller, sees the fundamental purpose of an office as a way to maintain the “weak ties” that are so important to value creation — what he calls a “purposeful crossroads.” In this way, he says, “the fundamental purpose of the office is to maintain the health of those extended networks and keep people in touch with the culture and spirit of their organization, nurturing that sense of belonging and community. It’s kind of like a long-distance relationship. Is it possible? Yes. Can you thrive? In some cases, but there’s a reason why we like to be co-located, and a lot of it has to do with our relationships.”



Designing for Organizational Resilience

Whether one believes that the pandemic was an anomaly, that it simply accelerated forces already in motion or that it catalyzed a shift to an entirely new way of working, one theme was constant across all industries: the importance of resilience, both from an organizational and leadership point of view. Gartner's model of organizational resilience is composed of five categories: Leadership, Culture, People, Processes, and Infrastructure.¹⁹

While there is as yet no historical data on the impact of the pandemic, companies like Dell are actively collecting data across the business and applying predictive analytics to assess risk and other factors that will inform its distributed workplace plans. This can include signals from collaboration tools, emails, business applications, and smartsheets, among other data sets. The idea, says Mark Pringle, Senior Vice President of Corporate Real Estate, Global Facilities

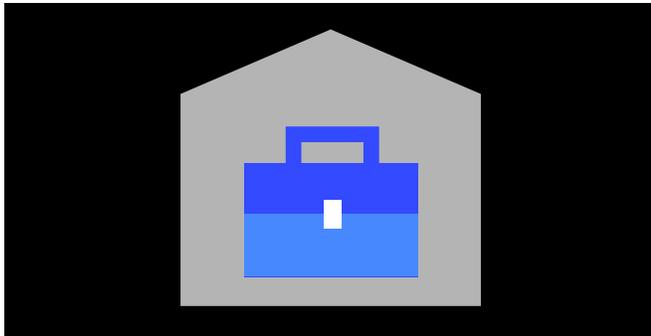
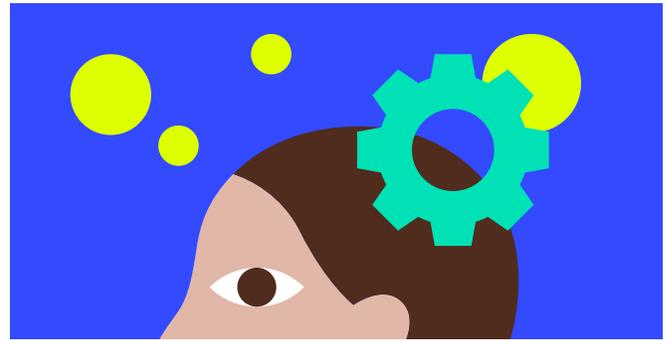
and EHS, at Dell, is to develop a structured process not only to inform the return to worksites, but to aid in planning. "Nobody would have thought 95% of employees aside from essential workers would work from home," he says, "so those who gather the data and lean forward will be the most successful."



Flexibility Does Not Equal Agility

While some people have adapted quickly to the demands of remote work and some sectors experienced at least temporary increases in productivity, there is quite a bit of analysis yet to be done. "A lot of the people I speak with are of the opinion they are agile because they are now working from home," says Jeroen Cornelissen, Director, ICT, Volker Wessels. "But flexibility is not the same as agility. We've got this challenge because a lot of people are already thinking, 'We're there. We've done it. We provided some new tools, and thus we have become digital. But that's not the situation, of course.'"

To build organizational agility requires a concerted effort not only to be personally adaptable in the face of change, but to activate it across the organization. This requires an understanding of the requirements, processes, technology, and cultural impact of distributed work and the infrastructure to support it in a sustainable way.



The Binary Workplace Model Is No Longer Relevant

Beyond the obvious impact of organizations paying for office space that is likely to be empty or underutilized for some time to come, the pandemic exposed a number of areas of fragility: from leasing models, to fixed expectations as to where people must work and live, to a binary (“work” versus “home”) model that is difficult to unwind and that no longer suits the dynamic nature of the workplace. The risk is that companies become unable to flex quickly enough to meet the demands of changing imperatives and that they suffer because of exorbitant operating costs, reduced productivity, an inability to attract the right workers, or other issues.

Changing Employee Needs and Expectations

There is also the question of changing employee expectations about how and where they work. Since the beginning of the year, says Dell’s Pringle, “there has been a mindset shift that people can work well remotely and not in the office.” The upshot, he says, is that “work is no longer anchored to a specific place or time; it’s really about outcomes.” In some markets, this shifts the conversation from quantitative services (foodservice, fitness centers, and break rooms) to qualitative issues (wellness, diversity and inclusion, and a sense of community). Some markets, however, may need to prioritize the most basic needs--infrastructure, connectivity, and access to meals.

Taken together, all of these themes underline the danger of individual and organizational rigidity, as well as the value of a growth mindset.²⁰ Says Dave Kutsunai, Managing Principal at IA Interior Architects, “The main thing is to be agile, and as you learn more, adjust. Any fixed approach is going to become out of date quickly.”





RECOMMENDATIONS FOR LEADERS

1. View this experience as an opportunity to drive growth.

In conversations with 21 leaders representing 17 organizations, the most frequent theme, even amid the uncertainty and dislocation, was to consider this experience an opportunity to shift (or at least question) our assumptions about the role and structure of the workplace. Rather than a static place to house employees, how could we envision the workplace an enabler of growth and avoid the pitfalls of trendy but ultimately counterproductive models such as the open plan office?

This requires a thorough assessment of the factors that affect individual wellbeing, economic value and organizational resilience.

2. Consider employee wellbeing holistically.

It's important to account not only for safety, health and practical needs during the pandemic, but on the overall impact of distributed work on employees and their families. This means thinking about productivity not only in terms of unit economics but also considering the physical, psychological and social factors that influence their sense of trust, connectedness and loyalty.

3. Focus on ways to build social cohesion across the distributed workplace.

While video conferencing can “flatten” hierarchies (everyone is in the same-size box), it can also lead to fatigue and a sense of social isolation. And while social distancing and masks are critical for physical health, they run counter to the type of social cohesion required for high-performing teams to thrive. Organizations that adhere to social distancing while finding ways to foster social cohesion will be best positioned to adapt in volatile and challenging circumstances.



4. Actively seek new sources of data—and new metrics—with which to inform decisions.

Periods of disruptive change are the most critical time to consider the value of traditional metrics and seek out other signals that can deliver needed insight. Collect and use both qualitative and quantitative data to shed light on employee and customer experience, safety, and productivity, and encourage teams to propose indicators that may be missing or underrepresented. Examples could include productivity versus sentiment, workplace density versus performance measures, and trends in collaboration tool usage over time.

5. Recognize that you may need to adjust your leadership style.

Leadership in a distributed work environment is different from leadership at a physical worksite. It's not just a question of how to replicate Management By Walking Around (MBWA). "It's more about being conscious about what leadership you need to utilize when you are remote," says Herman Bjorn Smith, Chief Digital Officer at Multiconsult, "because it's a different situation. You treat people differently when you are on video than when you are face to face, and you need to be aware of this."

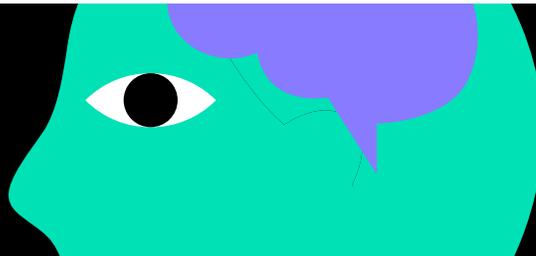
It also means re-evaluating familiar patterns, such as who needs to be in which meetings, and opening up lines of communication to validate assumptions about what is working and what is not.

A REIMAGINED WORKPLACE CHECKLIST

How can organizations use a global crisis as an opportunity to reexamine the assumptions that underlie their use of space? What factors should they consider? And what might a reimagined workplace look like? This section lays out a set of thought-starter questions to consider when performing a needs assessment:

- **Individual Wellbeing:** the physical and psychological health of employees;
- **Economic Value:** how the use of space supports value creation for the organization; and
- **Organizational Resilience:** the ability of the organization to thrive amid disruption.

Employee Wellbeing



- 1. Do employees who work at home have a safe workspace with ready access to ergonomically designed equipment, including:
 - a. Reliable power
 - b. Connectivity and the financial means to purchase it
 - c. Access to computers
 - d. A quiet work environment
 - e. Security
- 2. Is there a rigorous, evidence-based and clearly communicated set of design guidelines, processes and policies to facilitate social distancing while onsite? What measures are being taken in the areas of sanitation and contact tracing?
- 3. How can we ease the burden of employees caring for children or others in the home, for example, with time off, childcare, flexible scheduling, counseling or other supports?
- 4. What can we do from a process standpoint to better include employees working from home in distributed work environments?
- 5. What can we do from a design standpoint to better support mixed presence (e.g., remote and onsite employees) in team meetings and collaborative projects?
- 6. How can we configure both home and onsite spaces to facilitate parity and a sense of belonging among onsite and remote employees?
- 7. How many hours are employees spending in videoconferencing and using business/collaboration tools, and what guardrails can we put in place to prevent burnout?
- 8. How many hours are employees working overall, and is there a risk of overwork?
- 9. Have we complied with best practices and requirements related to social distancing?
- 10. How have all these factors affected employee morale and engagement?

Value Creation

- ✓ 1. What is the office good for that home/remote work is not?
- ✓ 2. What is the remote environment good for that the office is not?
- ✓ 3. What are the barriers to productivity in the office?
- ✓ 4. What are the barriers to productivity at home or in other offsite locations?
- ✓ 5. How can we use the office as a hub for social/team interaction safely and productively?
- ✓ 6. How can we design modular spaces that can easily be reconfigured based on team needs?
- ✓ 7. How can we alleviate barriers to productivity in remote work environments?
- ✓ 8. What is the best way for all options to complement each other?
- ✓ 9. What risks do we incur in these models from either a tax or liability perspective?
- ✓ 10. What are the implications for our commercial space needs?

Organizational Resilience

- ✓ 1. What are the most desirable leadership qualities in the reimagined workplace? What skills are we missing that we need? What attributes do we have that no longer serve us?
- ✓ 2. How can we extend organizational culture across distributed work environments in an authentic and thoughtful way?
- ✓ 3. What do we need to do as an organization to promote a sense of connectedness in the workplace, given social distancing requirements, and across workplace types overall?
- ✓ 4. What processes must we institute to support the ability of employees to work effectively in a distributed environment? What data do we need to inform those processes, and how can we measure them in a way that is diagnostic and helpful?
- ✓ 5. What infrastructure and business applications do we need to facilitate distributed work securely and at scale?
- ✓ 6. How do we create a sustainable model for workplace safety? What tools, processes and policies are required?
- ✓ 7. What trust issues are top-of-mind among employees related to safety, data use, and other issues?
- ✓ 8. How can we optimize collaboration in distributed work environments? Beyond tools, what are the methods we can use to promote a sense of inclusion and belonging?
- ✓ 9. How can we more effectively involve stakeholders in decisions that affect them? How can we become better at respecting and engaging diverse voices?
- ✓ 10. What are some ways we can promote trust and collaboration and preserve the value not only of strong relationships but of “weak ties”?



IMAGINING THE FUTURE

Since the pandemic began, so much has changed in daily life and in our ways of seeing the world. But — at least from a business perspective — the pandemic didn't create all of the seismic shifts we've seen; it accelerated them. Digital transformation was already well underway in many companies. Distributed work was becoming more common. But the past nine months have illuminated areas of organizational fragility that require more resilient infrastructure, workplace strategy and leadership qualities to address.

To thrive in this volatile environment requires a radical embrace of the reality in which we all now live, and the imagination and planning discipline to foresee new areas of risk and opportunity.

Volker Wessels' Cornellsen suggests that we think expansively to assess our readiness for what is to come. Rather than trying to imagine the next normal, he asks, "are we capable of working in the normal that will exist one-and-a-half years from now?"

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- ¹¹ For more detail on safe social-distancing practices, see “Designing for Social Distancing: Balancing Safety and Human Connection”: <https://www.autodesk.com/redshift/designing-for-social-distancing/>. Engineers and designers should see “Adapting to the Next Normal: Practical Design for Social Distancing”: <https://www.movementstrategies.com/news/webinar-adapting-to-the-next-normal-practical-design-for-social-distancing>.
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METHODOLOGY

This document was developed based upon online and in-person conversations with 21 experts, practitioners, technology vendors, investors, and others involved in architecture, manufacturing, engineering, construction, real estate, media and entertainment, and design, as well as secondary research, including relevant and timely books, articles, and news stories. Our deepest gratitude to the following:

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ABOUT US



About Susan Etlinger, Senior Analyst

Susan Etlinger is a globally recognized expert in digital strategy, with a focus on artificial intelligence, technology ethics, and data. In addition to her work at Altimeter, Susan is a senior fellow at the Centre for International Governance Innovation, an independent, non-partisan think tank based in Canada, and a member of the United States Department of State Speaker Program. She works with clients to assess the impact of AI and other advanced technologies on business and to identify use cases, opportunities, risks, and organizational and cultural considerations. She also works with technology vendors to refine product roadmaps and strategies based on her independent research.

In 2019, Susan was named one of 100 Brilliant Women in AI Ethics by Lighthouse3, a strategic research consultancy focused on AI. Her TED talk, “What Do We Do With All This Big Data?” has been translated into 25 languages and has been viewed more than 1.3 million times. Her research is used in university curricula around the world, and she has been quoted in numerous media outlets, including *The Wall Street Journal*, *The Atlantic*, *The New York Times*, and BBC. Susan holds a bachelor’s degree in rhetoric from the University of California at Berkeley.

About Altimeter, a Prophet Company

Altimeter is a research and consulting firm owned by Prophet Brand Strategy that helps companies understand and act on technology disruption. We give business leaders the insight and confidence to help their companies thrive in the face of disruption. In addition to publishing research, Altimeter analysts speak and provide strategy consulting on trends in leadership, digital transformation, social business, data disruption, and content marketing strategy.

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About the Growth Series

As organizations adapt to a new and unfamiliar landscape, what are the strategies that will position them for safety, resilience, and growth? This three-part series addresses the key shifts we are seeing as a result of the COVID-19 pandemic and other macroeconomic, industry, and technology trends; identifies the key strategies leaders need to consider; and shares emerging best practices from experts in the areas of technology, workplace safety, design, and leadership.

The first report in the series, “Strategies for Growth in the Reimagined Workplace,” focuses on the opportunity to rethink the role of the workplace as an engine for growth. The second will focus on people: customers, employees, partners, and other stakeholders; while the third will focus on innovation strategies and emerging business models.



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