

Reimagine The Future of Work

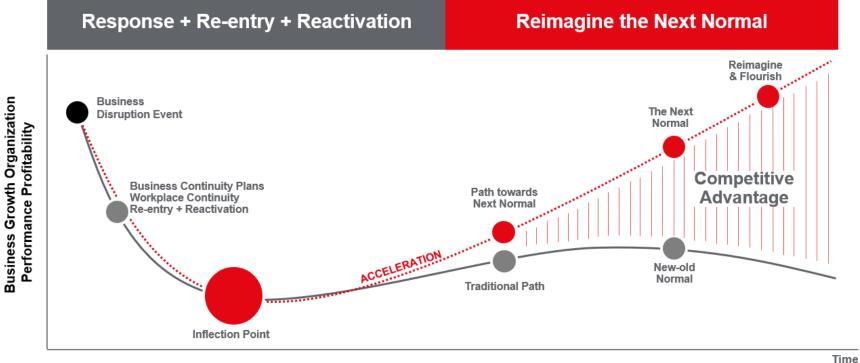
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An Important Inflection Point for Acceleration Post-Covid-19





An important Inflection Point with greater "Acceleration" to the Next Normal (Post-pandemic)

And there is no returning to the **Old Normal** (Pre-pandemic)

Big Winners will be the bold companies that break from the mainstream – those who act courageously and fast to gain competitive advantage

The Imperative for "Always On" Operational Resiliency



Reimagine Transformation Drivers

- Business Adaptation to Uncertainty
- □ Continuous Elasticity/Resiliency
- "Liquid" Workforce Transformation
- Digital Workplace Transformation
- "Hybrid" Workplace Ecosystem(s)
- □ Health/Safety & Wellness/Well-Being
- □ The Responsible Enterprise
- Sustainability Practices
- □ Organization/Culture
- □ Financial Performance

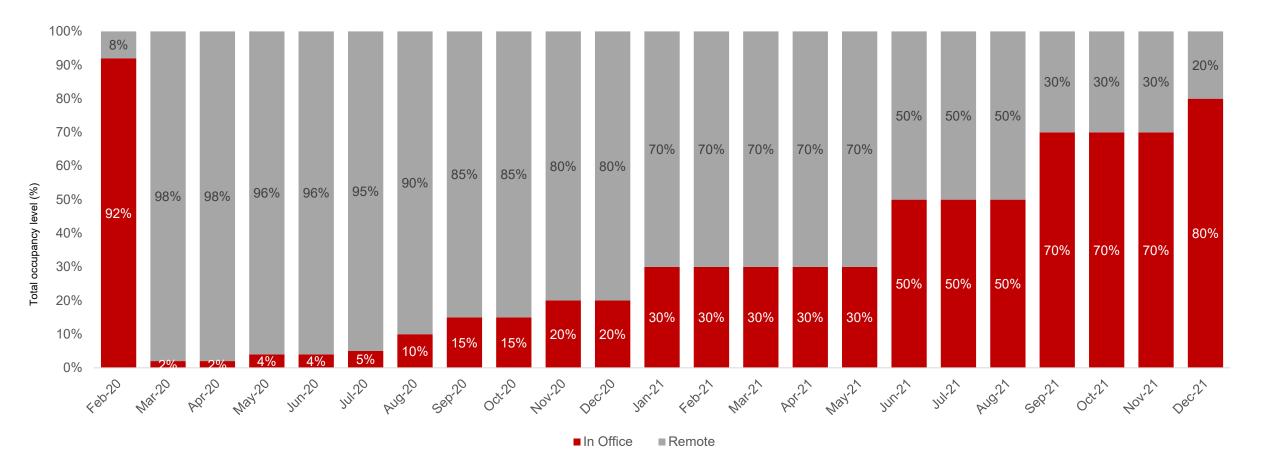
The Leadership Imperative to Act Now

CEOs recognize their businesses will never operate again as they did prior to COVID-19:

- Recognition of long-term COVID-19 coexistence that will require **continuous adaptation and elasticity**
- Big Winners will be the bold companies that **act courageously and fast with speed and confidence**
- Successful enterprises will adapt to the pattern of "Adaptive Triggering" (Lockdown/Relaxation) through operational resilience leading practices
- Top talent will demand diverse workforce preference(s) and "Hybrid" Workplace Enablement
- Organizational culture will evolve with diverse set of New Workplace Behavioral Norms

CEO Reimagine Enterprise Strategies: 'Always-On' Transformation & Resiliency become Essential

Office Re-entry Uncertainty Remains as of October 2020

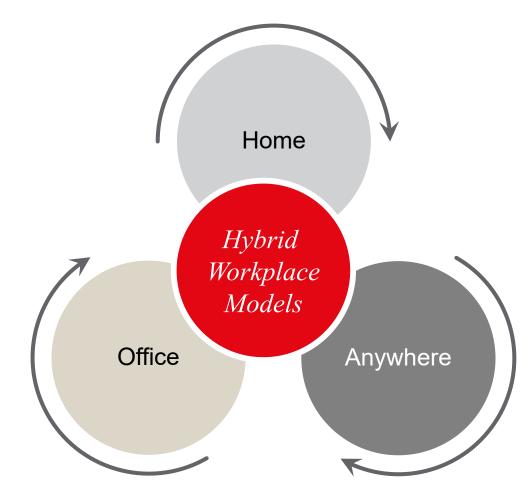


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Office re-entry is generally expected to be slow and methodical

Evolving "Hybrid" Workplace Challenges & Objectives





Workplace Challenges

- Business Disruption
- Change Acceleration
- Cognitive Fatigue
- Employee Fear
- Establishing Trust
- Human Health/Safety
- Increased Complexity
- Risk Management
- Talent Anywhere
- Uncertainty

Workplace Objectives

- Corporate Culture
- Elasticity and Agility
- Employee Choice
- Financial Performance
- Flexibility/Liquidity
 - Health & Well-being
 - Human Experience / Human Performance
- Resiliency
- Sustainability

Corporate Return-to-Work (RTW) + Work-from-Home (WFH)



Near Term RTW WFH and RTW percentage of employees returning to the workplace Q3-Q4 2020	Medium Term RTW WFH with RTW percentage of employees returning to the workplace Q1-Q2 2021	Optimize RE Footprint Percentage optimization in RE footprint tied with increased work-from-home		The Hybrid Model Work from office + work from home WFH "Hybrid" model for all employees announced		Permanent WFH Migrate to permanent WFH announced for all employees across all geographies	
Microsoft	TD 5 XX RBS	BARCLAYS	opentext	f	SIEMENS	🛐 shopify	<mark>‡</mark> slack
capital One amazon	shopify	Review 70,000 People	50% Reduction 15,000 People	50% WFH 45,000 People	WFH (2-3 days/wk) 140,000 People	100% Virtual 5,000 People	100% Virtual 2,000 People
Goldman Sachs Trading Personnel	Zillow Interim RTW	FUJITSU	bp	Walmart 🔆	вмо 😂	Y	U NOVARTIS
Morgan Stanley 💤 slack	FUJITSUJPMORGAN CHASE & CO.Interim RTW50% of Staff	50% Reduction 80,000 People	50-75% Reduction 70,000 People	WFH 10,000 People	80% HYBRID 46,000 People	100% Virtual 5,000 People	100% WFH Option 125,000 People
Trading Personnel		HALLIBURTON	STATE STREET.	Dell	Nationwide	Nationwide	A ATLASSIAN
	<40% of Staff until Vaccine Google	Closing 100+ Facilities	Much Lower Footprint	50% Hybrid 165,000 People	Interim Hybrid Model	100% WFH Option 32,000 People	100% WFH Option 3,500 People
Google Previous RTW in Q3-Q4 2020	Uber f Moved RTW to July 2021	Morgan Stanley Less Real Estate	Conference Board of Canada Selling Headquarters			Square	100% WFH Option 3,000 People

Source: Global Public News Archives

Reimagine the Future of Work Outcomes



Community	Well-being	Experience	Resiliency	
How can we support community and connectivity in person and virtually?	How do we respect and prioritize a holistic approach to health, wellness and well-being?	How do we create trusted, meaningful, safe and engaging experiences?	How will the future real estate portfolio enable agility, flexibility and resiliency?	
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Digital Innova	ive Assess Impact ation & of COVID-19 mance upon Employees	Monitor Safe/Heal Workforce Workplac Preferences Reactivat	ce Workplace	



