



**Gensler**

# MASTERING THE MOVE MANAGEMENT PROCESS

Your best practice guide for enhancing data integrity in the workplace.

# Why Manage Moves?

With data as a driving force for decision making in today's workplace, corporate real estate and facilities professionals are challenged with maintaining a current snapshot of the supply and demand of space.

## Challenges and Opportunities

If you've ever been a victim of the "midnight move," when occupants move into a new station without telling anyone—you've experienced how quickly seating plans become obsolete. These activities make it challenging to maintain accurate occupancy data (the demand on space).

While frustrating, this is also an opportunity to bring awareness to the importance of the data and to create transparency into processes that support data governance, strengthen communication and add value through accurate real estate metrics.

## The Value of Data

Tracking the supply and demand of space is critical for reacting to business demands quickly and efficiently. When accurate data is available, invitations to the decision-making table increase, and a proactive approach can move the business into strategy and action more quickly. This all starts with a thoughtful move management process that tracks ongoing churn.

## Understanding Churn

Churn measures the number of times somebody moves from one seat to another—also known as box moves. Box moves are often in response to a business need such as reorganizations, growth or reduction in staff, and transfers.

On average our Wisp clients experienced 49% churn in 2017. This indicates that half of all occupants moved at least one time last year. Think of how many employees you have within your own organization—that is a lot of activity to track.

Read on to learn guidelines for *Mastering The Move Management Process*.

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## Mastering The Move Management Process

### Common Challenges

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Data is stale in a week, that's how space planning goes. It needs to be immediate.

– Vice President of Corporate Real Estate,  
Banking and Financial Services Firm

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Tracking supply and demand as it changes is critical in the real estate life cycle and—when done successfully—a business can respond to demands more quickly. By maintaining accurate data, you'll be able to:

- Provide hard, irrefutable data to support a workplace strategy and/or test a hypothesis about occupancy.
- Verify current standards/benchmarks and space allocation metrics in the early stages of programming.
- Optimize a space to better suit the needs of the users.
- Determine departments for mobile readiness and consider the implementation of seat sharing as part of a mobility strategy.
- Identify opportunities to save space by consolidating leases.
- + More



## Mastering The Move Management Process

### The Solution

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After 25+ years of helping clients get a handle on their space and occupancy data, we know what works and what doesn't.

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In the following pages, we've outlined six steps to refine the move management process. This is the same process that we consult with our clients on during implementation and is considered an industry best practice. Whether your workplace portfolio is 30 million square feet or three thousand square feet, these steps can be right-sized to your organization and lead to meaningful and insightful results.

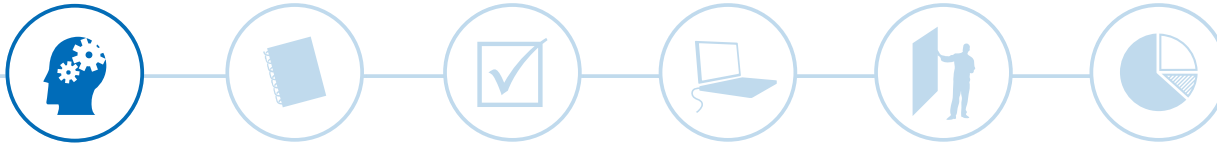


Mastering The Move Management Process

6 Steps for Improving the Move Management Workflow  
and Enhancing Data Integrity in the Workplace.

START

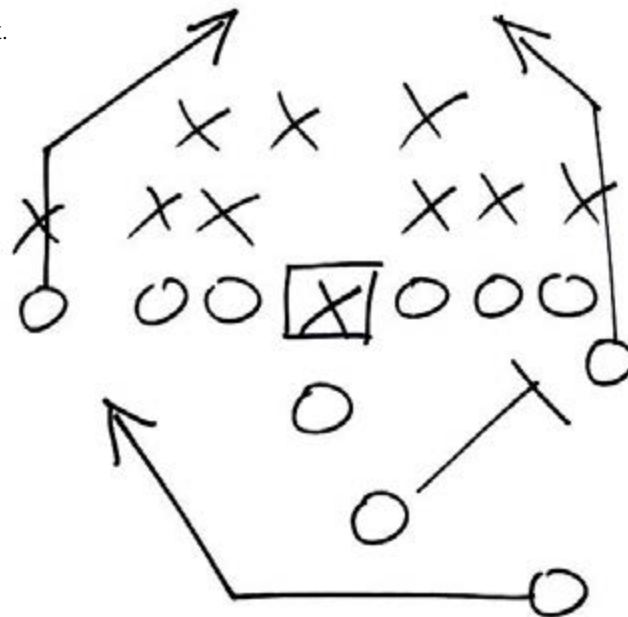




# Understand

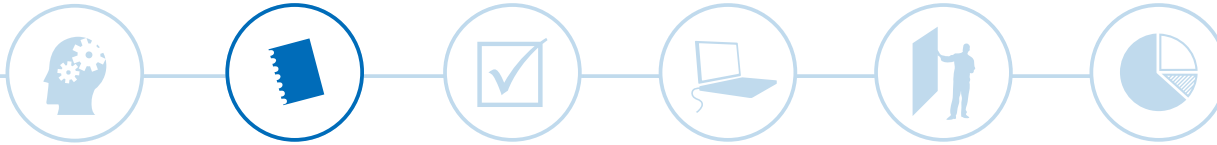
Start this process as an investigation—find out as much as you can about how the process is taking place today.

- Map out who the key people are, how they are involved, and what information is being transferred.
- Identify what is working well and what isn't.
- Don't fix something that isn't broken.



**Tip:** If this sounds like an overwhelming task, don't worry, we can work with you to help map this out.





# Define

Once the current process is mapped out, the next step is defining the new process — beginning with key roles.

**Tip:** Some organizations find it works best for them to have only two roles: Requester and Completer.



### Requester

These are people closest to the need, typically within the line of business: a department coordinator, department admin, or supervisor.

- The requester starts the process by identifying a need.
- There should be one requester within each line of business.



### Approver

Depending on the process, there may be someone reviewing the request prior to it moving forward. This role is typically a supervisor or manager.

- This is an optional role.
- They have the ability to deny the request.



### Completer

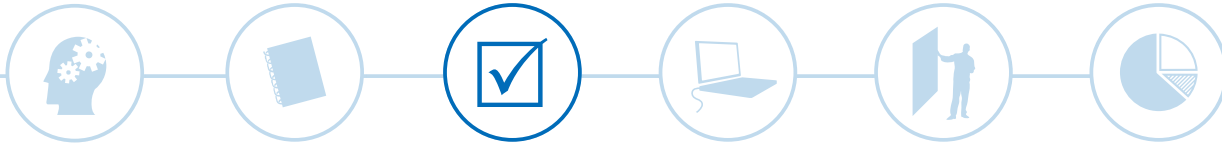
Typically, this role oversees all governance of the process and helps enforce that it is carried out correctly. This role is typically filled by facilities or the site coordinator.

- The completer is responsible for ensuring that the change is recorded accurately.
- There could be one completer per building, or one per several buildings, depending on size.

## Be Proactive.

When talking through key roles, there is sometimes fear of information getting “messed up” by opening the system to more users.

On the contrary, we’ve found that opening the system to others helps keep data more accurate. By empowering people on the ground to make requests, data remains updated as churn occurs.

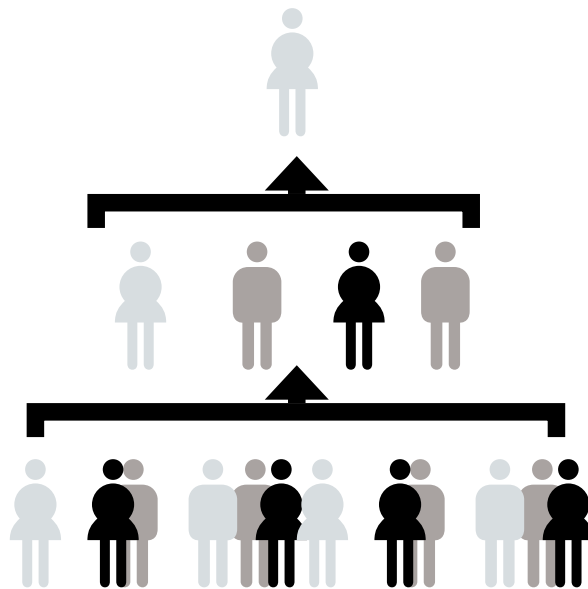


# Streamline

In this step we create consistencies in the process and eliminate redundancies—such as duplicate data entry.

Three ways to streamline move management:

1. Reduce or eliminate redundancy.
2. Remove the need for duplicate entries.
3. Create process and communication consistency.







# Automate

There are many tools available to automate tedious manual tasks. When your process has been outlined, consider automating these tasks:

- Data exchanges, including daily HR feeds or location information keeps data current.
- E-mail notifications can be triggered to streamline communications.
- Move sheets can be generated based on prior activities.

“With more and more millennials entering the workforce, this is perfect time to roll out automation. If there is a chance to remove paper forms and automate, they are all for it.”

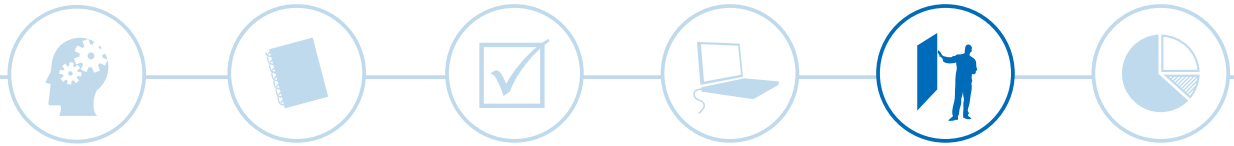
–Shawn Biven,  
Senior Property Manager at ADP

**Tip:** The Wisp **Space Request Utility** is an easy tool for the Requesters to submit a move request in three steps:

- Step 1:** Select Occupants
- Step 2:** Enter Details
- Step 3:** Select Space

Add automation to the move request process with the Space Request Utility. This simple tool helps reduce the need for dual data entry and adds transparency into the request process. All submitted requests are considered pending and are held for approval and completion by those with appropriate access rights—all of which is configurable. When a request is completed, occupant data and floor plans are automatically updated in Wisp.

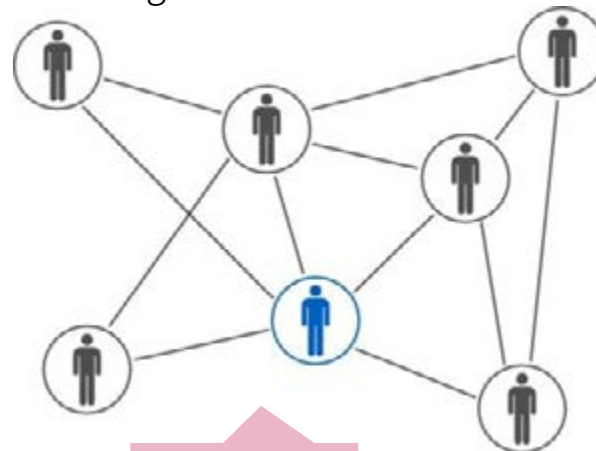




# Rollout

When the process is finalized, it's time to test it and create a rollout plan to streamline it across all locations. Start by mapping out the changers and understanding their needs.

1. Manage the change
2. Understand the audience
3. Start with a pilot
4. Engage early
5. Use a phased approach
6. Conduct post-launch follow-up



**Who** has to start doing something they don't do today?

**Who** has to stop doing something they are used to?

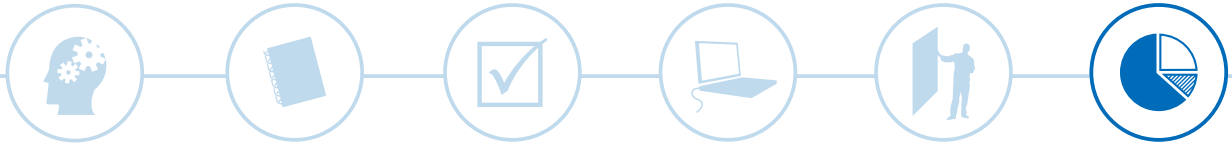
**What about others** whose workflows will be affected too, e.g., HR & IT?

How about your **business leaders?** What will they have to change?

**What is the hardest thing we're asking (from their point of view?)**

## Change Management Tips

- Recognize and reward success.
- Enforce positive incentives, not penalties.
- Provide praise and spotlighting from leaders.
- Stay positive and hold the line.



# Track and Improve

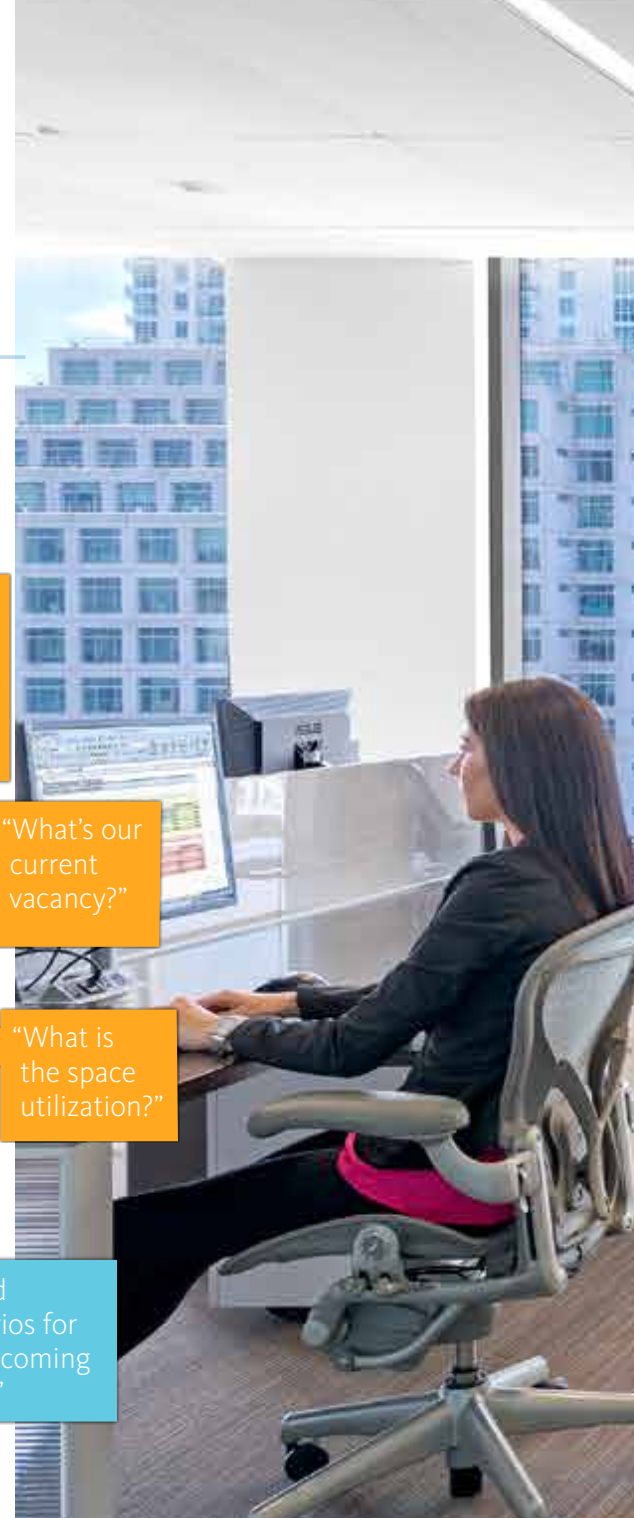
With the new process rolled out and the right tools implemented, you'll have access to the data and information you need at all phases of the real estate life cycle.

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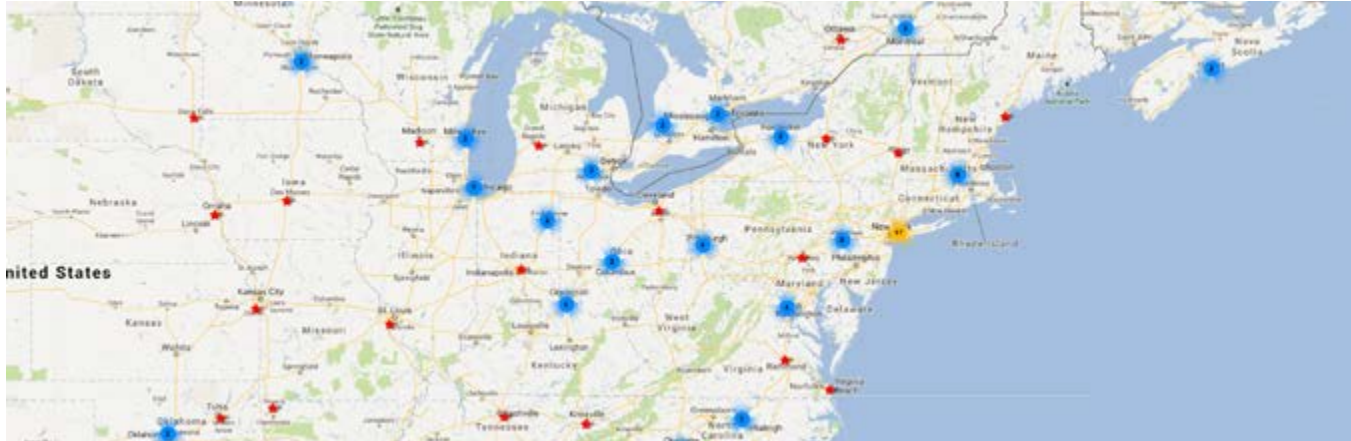
– *Christi Van Maanen, Gensler*

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## Mastering The Move Management Process

### Case Study



In 2017, this global data processing firm was experiencing a 62% churn rate. That's over 25,000 opportunities for data to become outdated as occupants moved within the company. With a global portfolio of approximately 160 buildings, over 7 million SF, and 40,000+ occupants, it was a struggle to maintain accurate occupancy data.

From manual move forms to midnight moves, walk audits were frequently needed to verify seating assignments. Each site was operating independently, resulting in inconsistent and unreliable data, and redundant processes were commonplace.

To improve the process, we worked with their team to understand the current workflow. Roles were then identified to support their portfolio structure—this included an admin as the “requester” and the site coordinator as the “completer”. With the new process, tools for automation were introduced.

Using the Space Request Utility, admins submit requests, and





the site coordinators review and approve the requests. With moves in the queue, a move sheet can simply be exported and provided to the move team. After a move is complete, the site coordinator completes the request within Wisp, thus maintaining a current inventory of people and space data.

This improved process with interactive tools has ensured that the appropriate roles have the ability to submit requests, it has eliminated the need for dual entry of move requests, and communications have been streamlined with automatic e-mail notifications and move sheets. Most importantly, it is a proactive approach to keeping the data accurate.

Today, the company is in the process of aligning its locations and departments to use the same process. What started as a pilot in their headquarters has been rolled out to additional sites. Consistency and accountability is achieved through monthly standing calls that keep key contributors in close communication to discuss challenges and solutions. The company is now benefiting from more accurate reporting and significant time savings.

## GLOBAL PORTFOLIO

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 <b>Buildings</b>	160
 <b>Total SF</b>	7,560,146 SF
 <b>Headcount</b>	40,647
 <b>Churn Rate</b>	62%

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### Challenges

- Manual forms
- Inconsistency
- Dual entry
- Reactive approach

### Process Improvements

- Mapped process
- Defined key roles
- Rolled out Space Request Utility
- Streamlined communications
- Automated move sheets

### Change Management

- Pilot location
- Phased rollout
- Ongoing communication



Gensler is a global architecture, design, and consulting firm with 5,000+ professionals in 46 locations around the globe. With more than 2,000 active clients representing nearly every industry, we've found a niche helping clients manage their workplace and occupancy data.

We have grown an entire practice dedicated to supporting clients and delivering innovative tools to support the different phases of the real estate life cycle.

Learn more about how we help our clients measure and maintain multiple dimensions of the workplace—vacancy, occupancy ratios, space efficiency and more—with our space and occupancy management platform, Wisp.

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