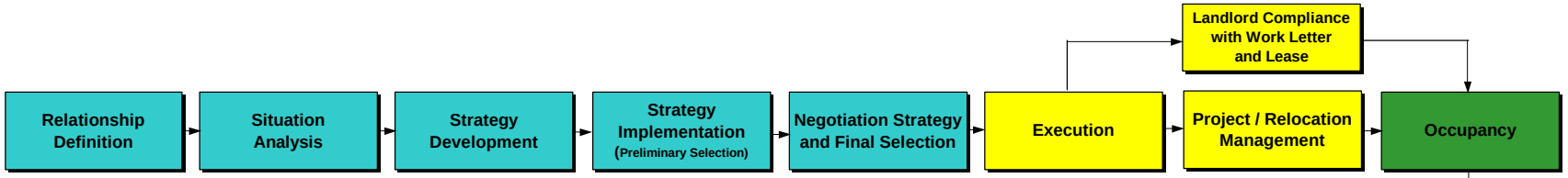
Strategic Workplace Planning & Process Management



Relationship Definition

Confirm project team members & assign responsibilities

Develop project timeline

Develop quality standards and success criteria

Establish communication and reporting standards

Conduct Kick-Off Meeting

Situation Analysis

Understand business objectives and impact on work processes and structures

Understand problems with existing real estate

Understand cultural objectives and limitations-current and projected

Evaluate market conditions

Develop/analyze headcount forecasts

Evaluate work environment related issues

Strategy Development

Establish base case

Analyze business objectives in the context of Real Estate *Forces* to produce prioritized project criteria in the following areas:
- location
- facility
- total occupancy costs
- space design (including structural, mechanical, electrical, and technological requirements)
- flexibility

Quantify "sacred cows"

Confirm consensus on prioritized project criteria

Evaluate *all relevant* occupancy alternatives against project criteria:
- co-location (economies of scale, cultural considerations, synergy)
- business unit separation (distinct business drivers)
- functional separation (distinct use and costs forces)

Select appropriate occupancy alternative(s) and finalize project objectives

Reconfirm project objectives

Strategy Implementation (Preliminary Selection)

Identify all properties that reasonably meet project criteria

Conduct Tenant Satisfaction Surveys

Conduct comparative analysis
- use
- cost (cash flow, NPV, after tax financial reporting, internal indexes)
- image

Coordinate initial property tours, if appropriate

Develop & deliver RFP's

Prepare negotiation strategy

Select Finalists

Negotiation Strategy and Final Selection

Identify governmental incentives
- tax incremental financing
- other

Understand landlords'/developers' positions
- economics
- market dynamics
- sophistication
- major tenant flux
- landlord motivations

As appropriate:
Develop acceptable range of
- land value (1)
- building shell cost (1)
- lease rate
- lease term
- tenant improvement $
- architect/design allowance
- move allowance

Finalize negotiation strategies for each finalist

Negotiate with finalist(s)

Final analysis with recommendation

Select finalist

Negotiate final agreement

(1) Build To Suit Implementation

Execution

Document review

Final Changes

Lease Execution

Preliminary move-in schedule

Project / Relocation Management

*** Project Management**

Establish project timeframe

Establish comprehensive budget

Manage process for selection and hiring of suppliers
- building shell architect
- space planner/architect
- developer/general contractor
- voice/data wiring
- phone system/comm. server
- fax servers, unified msg.
- copiers, fax w/connectivity
- IT/network w/workstations
- movers
- others: dial-tone, etc.

Project/financial controls
- negotiate build-out + other contracts for best economics
- budget/timeline
- build-out quality
- compliance with lease contract build-out schedule and terms

Ensure compliance with business objectives
- features/feasibility fit analysis
- building design, space/design, shell and tenant improvement and move budgets
- construction documents

*** Relocation Management**

Final move-in schedule

Identify special issues

Final checklist

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