Workplace Innovation:

Collaborative Working Environments: Hype or Competitive Advantage?

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www.johnsoncontrols.com/globalworkplaceinnovation
Johnson Controls has three world class, growth businesses

Automotive Experience
- 240 locations
- $20 billion
- Global leader in automotive seating, overhead systems, door and instrument panels, and interior electronics

Building Efficiency
- 500 locations
- $14.9 billion
- We create buildings and environments in 125 countries that help people and businesses achieve

Power Solutions
- 27 locations
- $5.9 billion
- Global leader in lead-acid automotive batteries and advanced batteries for Start-Stop, hybrid and electric vehicles

Global WorkPlace Solutions
Frankfurt, August 2012
Global WorkPlace Solutions is the world’s largest Real Estate and Facilities Management business

We are a single source service provider of:

- Real estate portfolio management services
- Design and construction management projects
- Facilities and energy management solutions

- More than 21,000 employees in 75 countries
- Growing at a rate of 2,000+ employees per year
- We run the largest innovation program for our industry in the world
- 1.8 billion square feet of commercial real estate under management, more space than all the buildings in Paris or Washington
- Customer retention ratio averages over 95%
- A partner for the long-term — some customer relationships span more than 25 years
Global WorkPlace Innovation

- Research Programme
- Knowledge and Intellectual Capital
- Customer centric offering
- Thought Leadership
Agenda

Where are we today

Emerging trends, developments and disruptors

What the future holds
Where are we today

Emerging trends, developments and disruptors

What the future holds
Redefine Work Place
Workplace leading Change

- Attitude towards work
- Impact of Technologies
- Place of People
Emerging trends, developments and disruptors
B.Y.O.D.
Emerging Trends

- Seamless Experience
- Individualism
- Collectivism
- Digital Authenticity
- Nomadic Life

Digital Nomads
Intensive Collaboration
Pixels Everywhere
Experience Design
Green Aesthetic
Redefining the Experience of Work

94% of the ideas are not generated at work

Source: HBR
Beyond Sustainability

94% want their employer to go BEYOND environmental compliance and actively engage in green solutions at work

Source: Oxygenz – Multigenerations at work – 2012, Johnson Controls, Inc.
Pixels Everywhere

62% of our respondents consider a high use of touch-only computing device (ex: iPad) in 2020 - 16% now

The office: a collaborative platform

*Use of team spaces that have built-in collaborative technologies increase from 20% to 52% towards 2020*

Source: Collaboration 2020/ hype or competitive advantage – 2012, Johnson Controls, Inc.
Nomadism is the norm

73.6% of Digital Natives agree to completely agree that new technologies are ADDICTIVE

How to prepare?
Be receptive and adaptable

- Nomadic behavior
- Responsive and adaptable environments
- Digital environments
- New work experience
- Intensive collaboration
Where are we today
Emerging trends, developments and disruptors
What the future holds
More space to collaborate
The Eco Office of the Future: a smart working environment, shaped around a community

Source: The Smart Workplace 2030 – 2010, Johnson Controls, Inc.
The Smart Workplace 2030
Shrinking Social Distances and Boosting Collaboration
Synchronous communication across time and distances

Source: The Smart Workplace 2030 – 2010, Johnson Controls, Inc.
The Hive... The Network: a networked workplace structure

Source: The Smart Workplace 2030 – 2010, Johnson Controls, Inc.
Collaboration: Hype or Competitive Advantage?
Succeeding with collaboration at a level where it represents a competitive advantage requires a broad approach

The function or role of the office and the physical workplace is rapidly becoming one of supporting collaboration.

There is a gap between current and projected needs of knowledge workers and workplace infrastructure.

The use of video communication and real-time collaboration tools will increase substantially.
The main function or role of the office is rapidly becoming one of supporting collaboration

**Implications**

**Workplace**
- Realign service offerings
- New service concepts

**Collaboration**
- Paying lip service is not enough
- Disconnects between high-level collaboration objectives and day to day operations
There is a gap between current and projected needs of knowledge workers and workplace infrastructure

Implications

Workplace

- A shift towards bespoke user experience
- Unplugging FM

Collaboration

- Service conceptualisation
- Collaborative engagement through awareness and training
The use of video communication and real time collaboration tools will increase substantially.

**Implications**

**Workplace**

- Distributed collaboration infrastructures distinctively different from current solutions
- Retrofitting programmes
- Multiple disciplines in the decision making process

**Collaboration**

- Beyond the technology solutions
- Unified helpdesk service functions
Recommendations

1. Leadership
2. Training
3. Technology
4. Workplace
5. Knowledge
6. Immersive Solutions
7. Services

Global Workplace Solutions
Frankfurt, August 2012
Recommendations

1. **Leadership:** Facilitating and fostering a constraint-free environment
2. **Training:** To raise the level of engagement
3. **Technologies:** Collaboration engaging “kit”
4. **Workplace:** Provision of the right working environment
5. **Knowledge:** Fast and easy access to a knowledge platform
6. **Immersive Solutions:** Touch based and immersive technologies
7. **Services:** Smart facilities management services
“My business owner could be more into technology. It is an arm twisting session to get him to do anything new with technology.”

An anonymous knowledge worker
The Experience of Work is changing

- Digital Nomads
- Intensive Collaboration
- Pixels Everywhere
- Experience Society
- Green Aesthetic
Redefine the World of Work

www.johnsoncontrols.com/globalworkplace
RESEARCH AND INNOVATION

Businesses need to innovate to succeed in a rapidly changing world. That's why Johnson Controls Global WorkPlace Solutions runs the largest workplace research and innovation program in the real estate industry - GLOBAL WORKPLACE INNOVATION (GWI).

We identify and study workplace trends to understand their impact on business performance. We analyze our findings to drive innovation through our customers' workplaces, making them more productive, flexible and fit for the future. Learn more about the program and current research projects.

Collaboration 2020
Office workers expect collaborative workspaces towards 2020.

Roadmap 2020
Insight into future megatrends and their impact on workplaces.

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DIGITAL NATIVES RESEARCH
Why & how businesses must tailor workspaces to young workers.
NEW Research report
Workplace newsletter article

MEET US THERE
WorkTech New York, USA: 16 May 2012
EFMC Conference Copenhagen, Denmark: 24-25 May 2012
CoreNet Conference, New Zealand: 7 June 2012
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