

## **ADVANCING SKILLS**

### **Core Competencies for Corporate Real Estate Professionals**

In the early 1990s, Corporate Real Estate 2000 created a powerful new vision for the corporate real estate industry. Now, almost a decade later, an exciting new vision is emerging. The evolving vision of the business environment together with the impact of global socio-economic drivers created Vision 2010 for our profession. New skills and processes are urgently needed to meet the challenges of tomorrow.

In order to be able to cope with all these changes, corporate real estate (CRE) professionals must use a competency-based process to build up their CRE team. They need to understand the difference between skills and core competencies. They must establish what their core competencies are and develop a methodology and process to manage. Core competencies are those capabilities that are critical to a business achieving competitive advantage. Bain & Company suggested that understanding core competencies allows companies to invest in the strengths that differentiate them and set strategies that unify their entire organization.

In this presentation you will learn:

- What are the core competencies for CRE professionals,
- How to establish competency models for your organization and
- Why is a competency-based management system important to you as an individual and to your organization as a corporation?

Mr. Lam has extensive experience in researching and establishing core competency for the CRE profession and in 2005 he was appointed by The National Academies of Washington, DC to serve on the working committee on Core Competencies for Future US Federal Facilities & Asset Managers in 2020.

### **Stress, Motivation & Performance**

Two elements that influence optimal job performance are stress and motivation. According to a survey prepared by Northwestern National Life, 40% of the workers reported their jobs are very or extremely stressful. People are subjected to stress constantly from commuter traffic, deadlines, bills, angry bosses, irritable spouses, noise, social pressures, physical sickness and mental challenges. For corporate real estate (CRE) professionals, we can add to the list: outsourcing, downsizing, job insecurity, under-funding, do-more-with-less, job dissatisfaction, lack of business direction and unclear career paths.

Much attention has been given to emotional intelligence (EQ) in recent years, and people with high emotional quotients are generally believed to be more resilient and more successful. The 1997 Wagner Study for the American Psychologist on effective job performance indicated that the influence of IQ represented only 6%, while EQ scored 27%.

The objective of this seminar is to examine job stress and how it bankrupts our work motivation. We will examine how the CRE job has changed over the years and how we must adopt a new paradigm in our thinking and approach in order to achieve optimal performance in today's demanding business environment.

Drawing from the latest research in stress management, (EQ), workplace health, motivation, creativity and, with more than 30 years of corporate experience, Alex Lam will discuss what CRE managers need to do to maintain a healthy work-life balance and how best to deal with stress for yourself and for the people around you.

Key learning points:

- Understand elements of modern-day stress and learn how to minimize your own personal stress and stress of others.
- What are the forms of motivation and what you need to do to motivate yourself and your staff to influence performance?
- Understand the concept of emotional intelligence (EQ) in workplace performance.
- What are the key elements of optimal performance in today's CRE workplace and how to cope with do-more-with-less?
- Learn how to design a strategy with your CRE team to create an environment to reduce stress and maximize performance.

### **Why We Do and Do Not Lead**

To succeed in the Digital Age, you need "extreme leadership" - which consists of extreme tolerance for ambiguity, extreme understanding of people and an extreme ability to communicate. The business world is global, digital and fast-paced, and those who succeed will be the ones who are empowered to respond with innovation, creativity and speed. Today's environment demands extreme clarity and resolve and the ability to flex in a cyber-minute. Learn the three main reasons we in corporate real estate often do not lead where we need to, and the reasons we do lead or should lead to meet the demands of a changing workplace.

### **CORPORATE REAL ESTATE FINANCE**

#### **Real Estate Transactions Impact on Corporate Financial Statements (Abridged EDP Seminar)**

Financial statements summarizing the present financial condition of a business are the indisputable starting point for management and investment decisions. Bridging real estate transactions with corporate financial statements, this course will illustrate the importance of understanding the CFO view of corporate real estate within the framework of financial reporting. You will learn how senior management, financial institutions, investors and shareholders use financial statements and how real estate transactions impact financial performance measures.

### **DIVERSITY**

#### **Global Diversity and Inclusion: A Business Imperative for our Industry Recruiting, Retaining and Building A Diverse Workforce**

The business world is becoming increasingly diverse and competitive. As a result, building and sustaining a diverse workforce that reflects a broad spectrum of perspectives has become a business imperative for real estate service organizations. Women and people of color account for less than 4% of senior management positions. Doing business globally requires new cultural competencies. How does this new reality impact our future competitiveness?

Gain new insights about competing for talent:

- the business case for a diverse workforce
- tools for creating and maintaining a high-performance culture of inclusion
- strategies for achieving senior-level commitment and organizational buy-in
- strategies for effectively identifying and recruiting diverse entry-level and lateral hires
- strategies for effectively developing and retaining diverse employees that enhance the development and retention of all employees

#### **Supplier Diversity: Exploring and Highlighting Best Practices within the Corporate Real Estate Industry-- Defining, Meeting and Exceeding Your Diversity Goals**

This workshop will explore some of our industry's most pressing issues and challenges related to supplier diversity. More importantly, it will highlight some of the various approaches and best practices related to supplier diversity.

Key learning points:

- An overview of supplier diversity: the evolution, trends, challenges and opportunities
- Discussion of best practices from various perspectives
- Nuts and bolts discussion of the supplier diversity certification process
- How to leverage supplier diversity as a competitive advantage

## **INDUSTRY SECTORS**

### **Entry Strategies for Special-Use Life Sciences' Real Estate Assets**

This workshop will explore various market entry strategies that factor in life sciences' requirement for highly specialized research, development and manufacturing facilities. When faced with the decision of where to locate a new facility or operation, there are a multitude of issues unique to the industry that must be considered.

Key learning points:

- Insight into the unique considerations of the life sciences site selection process
- Examples of approaches, team structures, and methodologies for conducting the selection and decision processes
- Highlights of several unique solutions that have resulted in significant improvements over more traditional approaches

## **LOCATION STRATEGIES**

### **Becoming a Global Gateway: A Vision for International Trade in Southern California**

The Ontario Economic Development Agency used the city's strategic location to create partnership opportunities between medium-sized businesses in the United States and China. The program has created lucrative export contracts and economic growth for the city.

Gain a competitive advantage by changing your economic development strategy:

- leverage local infrastructure into international opportunities
- prepare and pre-screen to "match" importers with exporters
- enable international trade for domestic companies

## **Being the Right Location: Effective Strategies in Today's World**

Global business drivers are creating fundamental change in corporate location strategies. To adapt, community economic development approaches must change too.

Attract more business to your community by leveraging:

- the impact of offshoring and the rise of China and India
- your community's competitive advantages and what the future holds for U.S. communities
- the changing site selection process
- an understanding of the competitive pressures that many businesses are facing

## **CoRE 2010: The Strategic Role of Place**

### ***How Will Global Strategies and Trends Impact Your Role as Location Analyst/Strategist?***

The focus of this program is the changing nature and growing sophistication of corporate location strategies, including:

- Examples of innovative practices by Intel;
- The shifting opportunities and risks currently afforded by various locations such as the current trend for location branding and specialization;
- Trends and projections into the future, which are impacted by macroeconomic and social forces of large-scale migrations of jobs, nationally and across the globe; and
- The opportunities, roles and processes of the corporate real estate/infrastructure function in location analysis, decision-making and delivery to optimize enterprise and business-unit needs and strategies.

Corporate Real Estate 2010 (CoRE 2010) is the latest proprietary research and leadership development initiative of CoreNet Global. It projects that the changing business environment will necessitate changes in future real estate practices with resultant implications for the corporate real estate role. Referenced in top publications including The Wall Street Journal and the National Real Estate Investor, CoRE 2010 is supported by research from more than 80 national and global companies and validated by a Gallup Survey commissioned by CoreNet Global in 2004.

## **Distributed Work at the Intersection of Corporate Real Estate and Regional Economic Development**

Technology brings work to workers, and the emergence of "third places" - community-based work centers not affiliated with a particular company - enables companies to access talent anywhere, with minimal real estate investment.

Increase your talent pool and create a more competitive company by:

- creating distributed work environments that attract and retain talent
- leveraging third place work locations
- integrating corporate location strategy with existing economic development programs

## **Politics of Place: The Battle of Location Incentives**

The business of attracting corporate residents to your corner of the world continues to accelerate in both complexity and uncertainty. This session features a recent success story but also poses a question - is this kind of success likely to continue?

Learn about the recent rulings by the U.S. Sixth District Court of Appeals and subsequently, the U.S. Supreme Court, regarding the constitutionality of one of the nation's most high profile tax credit programs. Hear how the state of Ohio addressed businesses' uncertainty over the availability of its flagship tax incentive, and how the Court of Appeals' initial decision gave the state's policymakers a springboard to comprehensive business tax reform. Using the "Cuno v.

Daimler Chrysler" case as an example, the presenter will discuss the potential implications of threats and changes to location incentives in the United States, from the firsthand perspective of a state that has had its own programs scrutinized, struck down ... and brought back to life.

Key learning points:

- Determining the "right" mix of incentives sources and options
- Assembling and leveraging a team of incentives and economic development professionals
- Understanding the potential implications of threats and changes to location incentives in the United States

### **Site Selection & Acquisition - An Introduction**

This workshop will review the latest corporate location trends, emerging factors of greatest importance in site selection, an outline of the analytical/decision-making process, and threats/opportunities concerning offshoring.

Attendees will receive detailed handouts comprising a guidebook for locating new office, manufacturing, R & D, and warehousing facilities. You will also receive an overview of retail site selection as well as key findings from the CoRE 2010's Strategic Role of Place task force, which includes best strategy design practices of multinational corporations.

Corporate real estate executives, service providers, and economic development representatives should find this course invaluable for better understanding the latest thinking in the design and execution of business location strategy. Program highlights include:

- Planning process for the selection of the optimal locations for corporate facilities;
- Criteria, business implications and techniques for selecting new locations;
- Differences in domestic vs. global location selection, and
- Location selection data resources.

### **Site Selection & Acquisition - Full Seminar**

How are best-of-class multinational companies charting and executing global location strategies? What are the newest trends influencing the siting of corporate facilities (offices, manufacturing plants, warehouses, and R&D centers)? What are the hottest geographies for new locations?

During this two-day seminar, we will review these dynamics plus the following:

- Planning process underpinning selection of optimal locations for corporate facilities
- Criteria, business implications, and techniques for selecting new locations
- Differences in domestic vs. global location selection
- Location selection data resources

Seminar participants will receive handout material, which contains the most current thinking in location planning and analysis. The material can serve as an operational guidebook for anyone involved in corporate location selection.

Seminar Highlights:

- Gain knowledge of current and emerging forces in the site selection field
- Learn from corporate case studies that illustrate different company approaches to site selection
- Maximize ability to select locations that will optimally support attainment of critical business objectives
- Obtain insights on emerging best practices influencing decisions of where to place corporate operations

- Provide state-of-the art training to corporate real estate professionals and service providers regarding site selection
- Orient experienced professionals toward the latest changes that are influencing corporate site selection

### **The Changing Landscape of Location Incentives**

The business of attracting corporate residents to your corner of the world continues to accelerate in both complexity and uncertainty. This session features a recent success story but also poses a question - is this kind of success likely to continue?

The collaborative partnership of Mintax, Associated Materials and the Greater Yuma EDC tells the story of successfully combining city, county and state resources to enable a new southwestern U.S. location for Associated Materials. This team - incentives and economic development professionals together with corporate representatives - worked together to leverage available resources and determine the mix of incentives that would allow Associated Materials to locate a new manufacturing facility in the U.S. rather than Mexico.

Key learning points:

- Determining the "right" mix of incentives sources and options
- Assembling and leveraging a team of incentives and economic development professionals
- Understanding the potential implications of threats and changes to location incentives in the United States

### **PARTNER COLLABORATION**

#### **CoRE 2010: Solutions Delivery and the Transformation of the Service Provider Industry** *How is the Role of the Service Provider Changing?*

The focus of this program is the evolving practice of outsourcing and role of external resources in enabling the core work of the corporation. Corporate solutions and service delivery will be examined from three perspectives:

- Solutions based on the integration of a service delivery network that includes the corporate end user, the internal corporate support groups and external providers;
- Changes in the real estate service provider industry, including distinctions between solution providers and service providers, and
- Integration across the different external provider industries (IT, HR, CRE, etc.) supporting corporate solutions delivery.

Examples of innovative practices by Procter & Gamble will be noted.

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### **PORTFOLIO MANAGEMENT**

#### **Advanced Lease Analysis -- An Introduction (Abridged EDP Seminar)**

This workshop reviews office leasing and the various (and sometimes very different) objectives of lease clauses when seen through the eyes of the landlord, tenant and legal counsel. Highly

practical, the workshop addresses many actual leasing problems and provides you with opportunities to learn from your peers as you engage in problem solving and debate.

The focus is how to dissect and analyze the lease through its individual clauses and by grouping those that impact one another, strengthening your negotiating potential and enabling you to maximize your corporate shareholder dollars. This workshop will raise your skill level, increase your understanding of the lease document, and raise the level of your organization's leasing process as you acquire the best practices of today's experts.

**Program Highlights:**

- Glossary of terms
- Lease checklist
- Tenant improvement checklist
- Basic lease provisions
- Tenant obligations
- Landlord obligations
- Physical aspects
- Negotiation process sequence
- Areas of mutual interest
- Case study lease

**Auctions and Barter – Other Opportunities for Creative Dispositions; When and Why They Should be Considered**

Learn how creative property dispositions - barter and auctions, for example -- can reduce unwanted corporate space in competitive environments.

**Key learning points:**

- Learn how these types of dispositions can create maximum value for certain disposition strategies, as well as
- The processes and marketing mechanics
- Case histories
- Legal considerations

**Enterprise Portfolio Optimization: On the Journey to 2010 Global Innovator Award Finalist**

Whirlpool Corporation will showcase an updated application of the (FAO©) concept in concert with their new decision making tool, Global Asset Positioning Tool. This is being used across the Company's global corporate real estate portfolio. The successful implementation of this process helped to earn Whirlpool an Alexander Hamilton Award by Treasury & Risk Management magazine for its outstanding contributions to improving shareholder value and innovation in commercial real estate.

FAO© measures the relative impact of different real estate financing decisions in ways that are meaningful to senior management, shareholders, stock analysts and credit rating agencies.

**Key learning points:**

- How to establish a consistent approach for WW project analysis.
- How to achieve a consistent approach to problems, consistent analysis of variables and standard reporting output.
- How to create global ownership and enterprise alignment of the real estate financing decision-making process.

**From Tactical to Strategic: Adding Value through Portfolio Management**

As noted in the CoRE 2010 research, successful real estate professionals must move beyond a purely tactical and reactionary approach to one that is "more strategic, agile, data-driven and geared towards the optimization of the entire portfolio."

This workshop describes a step-by-step process for portfolio management and best-practice activities for each step, including examples from CoRE 2010 research. Many organizations excel at some of these steps, but may be unaware of other opportunities. Longer workshops include more workshop discussion and detail.

Learning points:

- Move business alignment from a pure forecasting approach to scenario analysis
- Evaluate cost, productivity, and risk trade-offs
- Segment portfolios to identify appropriate portfolio strategies for each segment
- Use performance metrics to identify portfolio opportunities and drive results
- Recognize common mistakes leading to sub-optimal consolidation, reorganization, and long-term plans

### **Lease Restructuring**

Lease Restructuring reviews the landlord's and tenant's motivations and offers tools to assess the opportunity. This program will coach you on how to prepare for the negotiation and the pitfalls to avoid. It also reviews special cases such as rent buydowns, lease purchases, leveraged lease restructuring and other special cases. Financial models will also be highlighted.

### **M&A Strategies for Corporate Real Estate**

A merger or acquisition is the ultimate convergence - two or more companies coming together to become one. For some companies, such as McKesson and 3M, M&A entails a constant ebb and flow of complex business processes and change management activities. Real estate organizations traditionally find themselves in a reactive role in an M&A environment, yet they have a significant opportunity to create value through a more strategic approach. By collaborating with internal and external partners to proactively develop and refine more strategic tools, processes, and procedures, CRE can add value, enable speed, and mitigate risk during these critical business events.

This session will provide insights about how corporate real estate organizations can redefine and elevate their position in the M&A environment through a host of strategies and tactics to create value and mitigate risk during mergers and acquisitions by:

- enhancing communication with the business leaders and acquisition teams about the contribution and value of real estate in the M&A process
- collaborating with partners -- both internally and externally -- to enhance agility and readiness
- defining, codifying and adopting new processes, data definitions, and measurements to enable a consistent approach for all phases of the M&A process
- creating prioritized decision support tools and worksheets to enable speed, thoroughness, and business alignment

### **Navigating Real Estate & Facility Needs at Record Speeds**

CoreNet Global Innovator Award finalist, Johnson Controls, will demonstrate an innovative new planning methodology that makes use of a specially designed "game board" assessment tool, called the Solutions Navigator™. During the session, attendees will perform a real estate and facility needs assessment using the "game board" and then participate in a group needs prioritization exercise. After the session, you can request a copy of the attendees needs assessment results benchmarked against other corporate real estate organizations.

Key learning points:

- An innovative, new approach to strategic facilities planning
- Complete a facility needs assessment using a "game board" planning tool
- Compare individual priorities with those of other attendees and organizations.

### **Negotiating Operating Expense Clauses and Enforcement by Lease Audits**

Learn about the landlord's and tenant's preferences for certain inclusions, exclusions, definitions, limitations and procedures as they relate to building operating expenses. Topics may include: definition of capital expense, offsets of income to expense, costs included in management fees, property taxes, and tenant relation expenses, pro rata share calculations, gross-up language, audit rights and timeframe to audit.

Key learning points:

- A better understanding of operating expense issues from the landlord and tenant/auditor's perspectives, and
- How each issue should be negotiated, along with the economic impact of the issues.

### **Performance Portfolio Management—an Introduction (Abridged EDP Seminar)**

Learn why corporations consistently under-plan for real estate. Receive a high-level overview of the principles that form the foundation of Performance Portfolio Management as well as an introduction to the methodology and key terms. Study portfolio planning in action and learn to identify:

- structural challenges to portfolio planning in the organization;
- potential space categories and analysis clusters in the portfolio, and
- portfolio-wide initiatives to be researched and evaluated.

### **RENT BEGONE: Strategies for Eliminating Leased Properties from the Portfolio**

Over-expansion during the tech boom of the late '90s left Silicon Valley companies with considerable excess to be disposed into already oversupplied markets. Learn about the challenges, successes and the new disposition strategies that arose from efforts to trim excess office properties from their leased portfolios. Presentations and discussions will provide insights into the solutions pursued - some successful, some yet-to-be successful - and how they addressed the conflicting goals of corporate tenants and their landlords.

Key learning points:

- Economic, accounting, tax, and practical concerns bearing on lease disposals.
- The differences between corporate user concerns and real estate investors concerns.
- Strategies to structure transactions that address these different concerns.
- Different methodologies of engaging landlords and third parties in negotiations.

### **Sarbanes-Oxley and Corporate Real Estate Portfolio Management**

\$556 billion in stock value loss and a growing list of companies involved in corporate scandal over the past decade prompted Congress in 2002 to pass the Sarbanes-Oxley (SOX) Compliance Act. How does this law impact you?

Learn what Sarbanes-Oxley Compliance is, how it affects your corporation and the corporations you serve. Find out how to address the lease accounting issues that have been impacted by Sarbanes-Oxley.

Learn about the reporting requirements, the key components of the SOX documentation process and how to manage the process to protect your company and the companies you serve.

Key learning points:

- The impact of SOX on the CRE professional and service providers dealing with large corporations
- Identifying the Impact of SOX today
- Addressing lease accounting for SOX compliance
- Automating processes to facilitate compliance
- Technology solutions for SOX compliance

### **Setting Portfolio Strategies - Consolidation, Reorganization, and Long-Term Plans**

Portfolio consolidations and realignments provide one of the greatest opportunities for improving business alignment, reducing costs, and providing the right flexibility for the future.

Working with a case study and portfolio optimization modeling, we review some of the ways in which planners can improve consolidation, reorganization, and long-term plans.

Learning points:

- Recognize common mistakes leading to sub-optimal consolidation, reorganization, and long-term plans
- Move from a tactical to comprehensive view of the portfolio
- Ensure that the right data is collected within an integrated resource and infrastructure approach
- Move business alignment from a pure forecasting approach to scenario analysis
- Understanding when improving "space utilization" may not be the right strategy

### **Supply Chain Management—Integrating “Hard and Soft” Assets to Create A Competitive Advantage**

Aggressive and proactive management of the supply chain has become a key element in corporations' approach to creating a sustainable competitive advantage. The direction of logistics during the past decade has been the use of software applications to reduce supply chain costs. Serving the end-user in the global supply chain now requires new applications, including manufacture to order, mass customization, and other techniques that optimize service and cost levels. Further, there is increasing focus on hard assets – infrastructure, facilities, and equipment – in order to effectively participate in the global supply chain.

#### **Port San Antonio**

Port San Antonio in San Antonio, Texas is a 1,880-acre master-planned international industrial and logistics platform developed on the site of the former Kelly Air Force Base. The port represents a multi-modal platform integrating air, rail, road, and water transportation elements to satisfy the distribution, manufacture, and container transportation needs of corporations in the context of the NAFTA Corridor. The port is a prime example of a progressive approach being taken by the private/public sector to integrate a large asset into the global economy in the context of rapidly evolving supply chain and logistics models.

Key Learning Points:

- Importance of strategic vision to support transformation and aggressive goals
- Developing the appropriate sponsorship
- Critical leadership skills required for creating a best-in-class supply chain
- Realistic measurement of success
- Logic and process traps to avoid in supply chain management

## **Top 10 Ways to Avoid Surprises in Your Offshore Lease**

The American Bar Association and the International Bar Association have teamed with CoreNet Global to help you avoid critical mistakes common to U.S. businesses leasing and occupying real estate in China.

Avoid expensive leasing mistakes in China:

- understand major differences between leases in the U.S. and China
- identify critical issues (e.g. barriers to entry and exit of people, property and funds)
- recognize cultural differences in custom and practice and their affect on negotiations and contracts

## **Utilities: An Overlooked Source of Lower Occupancy Costs**

For many real estate professionals, spending on utilities is a sizeable component of occupancy costs, especially for electricity and natural gas. Yet utilities tend to be one of the least-managed and least-understood components of overall expenditures. The "overlooked" status of utilities primarily reflects:

- the confusing and complex nature of utility bills;
- the misconception that lowering these costs requires sizeable capital outlays;
- and the mistaken belief that even if savings can be achieved, their magnitude is likely to be insignificant.

This program will address such issues and demonstrate why and how a focus on utilities can produce significant results. The thrust of the presentation will be on what organizations can and should do to avoid over-spending on utilities and generate real savings. The presentation will include discussions of the following topics:

- how to decipher utility bills;
- where to look on utility bills for savings opportunities;
- how to assess your organization's savings potential;
- what information you need from your utility company, and
- how to formulate and implement an effective utility cost-reduction strategy.

Time permitting, case histories of specific utility initiatives will be included as examples.

## **What Type of Donation (straight donation, bargain sale, charitable trust) Might Fit Your Disposition Strategy and Why?**

Learn how creative property dispositions - donations, bargain sale, charitable trusts and the like -- can reduce unwanted corporate space in competitive environments.

Key learning points:

- Creating value by thinking outside the box
- Getting the right team in place
- Transaction execution tips
- Legal considerations

## **Principles of Project Management -- An Introduction**

In today's highly competitive real estate market, knowing the principles and practices of design and construction management can make the difference between taking control of the marketplace and losing control to your competition.

This presentation will introduce you to the technical world of project management, with a specific focus upon the principles of selecting the correct project delivery approach, assembling the right project team, and maximizing your chances of attaining overall project success.

If you want to be a team player in your corporation's competitive success, then it is essential to learn the fundamentals of how to bring your construction projects in faster, cheaper, and with higher quality.

### **Principles of Project Management – Full Seminar**

Streamlining your project management processes should be central to your corporation's game plan for gaining on your competition. If you can bring in your construction projects faster, for lower costs and improved quality, you will be a key player in your corporation's competitive success.

This seminar is designed for any real estate professional who is responsible for or is involved with new base building construction, multiple construction, build-out and/or alteration projects. The course is also designed for corporate real estate professionals who need to enhance and update their knowledge of project management, new techniques and the latest methodology for tracking a project's budget and schedule and finance. The following areas will be reviewed:

#### **Project Management**

- Learn the corporate perspective
- Team assembly: selecting your architect and contractor
- Managing multiple projects
- Learning design and construction vocabulary
- Problem solving and trouble-shooting

#### **Project Techniques**

- How to choose from project delivery options for new construction
- Tackling contract issues
- Procurement of construction services
- Understanding contractor's general conditions
- Fast tracking techniques with an emphasis on quality
- Project closeout checklist

#### **Budget and Scheduling Techniques**

- Learn how to manage the budget
- Dealing with politics, realities, and glitches in scheduling
- "Must-have" scheduling tools: GANTT, PERT and CPM
- Change order management
- Assessing value added measurement techniques

#### **Program Highlights:**

- Become adept at selecting the project team
- Learn the critical "how-to's" for managing and expediting people and processes
- Develop an understanding of how to work effectively with architects and contractors
- Learn new cutting-edge management techniques for keeping your projects on schedule, at or below budget, and at the highest quality
- Gain the skills needed to address project closeout issues
- Receive an extensive course manual that will help you long after the session

### **STRATEGIC SOURCING**

**Call Centers: In-shore, Near-shore, Off-shore?**

As enterprises strive to evaluate the changing demands of the global business environment, there are often questions about where customer contact centers should be located and whether they should be managed in-house or outsourced. The contact center industry is facing a wide variety of changes as globalization becomes a reality, outsourcing becomes a more viable alternative to captive corporate centers, and the convergence of technologies changes requirements for physical facilities and location. This presentation will consider the true benefits and opportunities of locating customer contact functions at home, over the border or overseas and whether they should be captive or outsourced.

The presentation will discuss how the industry is responding to changing dynamics and will look at domestic, nearshore and offshore alternatives. The presentation will also review the drivers of key industry trends - what is happening and why – both from a business and a technology perspective. In addition, the presentation will include considerations of why different centers and companies want to go to different places, and how companies are making their choices.

We will consider the hot areas of nearshore - the Dominican Republic, Costa Rica, Guatemala, etc. as well as Canada, the growth of offshore operations - India and the Philippines particularly, and Eastern Europe and other emerging areas.

These dynamics make the choice of locations for customer contact facilities ever more important and more difficult. Amidst the rush towards offshore development, some companies have found that the hype has exceeded the actual results. This presentation will focus on how the industry changes are driving requirements for locations and space and will compare the costs and benefits of domestic, nearshore, and offshore opportunities.

Key learning points:

- Factors to consider when identifying the scope of a site search for call centers
- Comparative strengths and weaknesses of domestic, near-shore, and off-shore locations.
- The importance of company values (e.g. employer-of-choice) in evaluating potential locations
- How technology trends are changing physical and geographic requirements for customer service operations.

### **Do You Know Where Your Partner Is? The Off-shoring of Corporate Real Estate Services**

The off-shoring of back-office services is not just happening in business sectors like automotive, technology or financial services - it's happening in real estate, too.

United Technologies Realty (UTR) discusses the perceptions, realities and potential cost and quality issues of doing business with a real estate service provider, which has off-shored its back-office services. UTR explores the opportunities and needs that are inspiring this trend as well as an example of an off-shore solution for data administration.

Key learning points:

- How the relentless drive for innovation and continuous process improvement is contributing to experimentation with the off-shoring of real estate services
- Networked solutions with global execution may include an off-shore component of delivery - if yours does, are you aware of it?
- How to assess company cultural perceptions and the risk/reward balance associated with off-shore delivery of real estate services

### **Finding The Right Location: The Dell Computer & Alien Technology Stories**

Identifying the optimal location for a new corporate facility can be a challenging task as companies weigh myriad and sometimes competing business objectives in the context of a rapidly changing global environment. Attend this session to learn the drivers behind two recent location decisions and how communities in North Carolina and Ohio were able to outmaneuver their competitors for major new facilities.

Key learning points:

- Access to skilled workers and work-force training
- Proximity to customers
- Quality of life amenities
- Availability of financial incentives

### **Off Shoring: How Big is This Issue, and Are Real Estate Professionals Prepared?**

This is currently a hot topic and one that may be picking up speed. China, India, South Korea, the Philippines and a host of other nations are investing heavily in education and modernized communications while offering low-cost skilled labor. This has the potential for a major impact on real estate as literally millions of jobs - manufacturing, service/support, and high-end knowledge based jobs -- could be moved offshore.

This program will discuss off-shoring in terms of how it is being done - the various business models being used, the types of jobs most likely to go offshore, proximity to mission-critical resources, risk management, and all aspects of real estate, including total occupancy cost and availability.

Key learning points:

- The issues involved
- The type of jobs being affected
- The net benefits derived from off-shoring strategies
- How to prepare

### **Strategies that Position and Enable Corporate Real Estate to Accommodate a Global Workforce**

Globalized site selection is a critical component to ensure success for business off-shoring strategies. Learn how to determine the optimal location when considering geographically dispersed business operations.

Key learning points:

- Structuring the business case for global growth
- Overcoming barriers to success
- Developing site-selection models and analyses
- Identifying and delivering cost savings
- Securing the support needed to succeed

### **Winning Strategies for Asian Locations**

Where are the current "hot spots" for investment in Asia (China, India and Southeast Asia), what are the emerging trends in the region that you need to understand to ensure your company's long-term competitive advantage and what are the challenges to conducting a comprehensive and objective site location analysis.

## **SUSTAINABILITY**

### **Beyond Green: Government Leaders Contemplate The Next Step**

The Public Sector around the world is committing resources to demonstrate how to cut costs, reduce pollution and achieve measurable sustainability criteria. Join an open dialogue with senior government officials about what governments are doing to achieve these objectives and what's next on the horizon.

Key learning points:

- Discuss current green government trends, initiatives and practices.
- Gain skills to move your green initiative forward.
- Learn about government success stories.
- Learn what's important for suppliers working with the government.

### **Building Green, Global Warming and the 2030 Challenge**

This presentation brings to light the enormous opportunity for economic, environmental and social enhancement through green building and sustainable design. Currently in the United States, 46% of all global warming emissions are due to the design, construction and operation of buildings. With high performance design and today's proven technology we can now build buildings that create more energy than they use, purify their own water, clean the air, and even grow their own food. Over 775 million square feet of new construction in the U.S. are registered or certified for LEED ratings (Leadership in Energy and Environmental Design). See how cities and businesses are choosing to build green, and save green.

Key learning points:

- See the environmental impacts of conventional construction practices.
- Understand the link between buildings and global warming.
- Find out about LEED and the value of a green building rating.
- Break the myth of expensive green buildings.
- What is an Integrated Design Process?
- See practical examples of buildings that are exceeding energy codes and saving money for building owners and tenants.
- What do realtors, brokers, lenders, appraisers and insurers need to know about green building?
- What you can do to accelerate green building in your business and community.

### **Converting Liabilities into Assets: What Can Brownfields do for You?**

Federal and state governments increasingly support the remediation and redevelopment of environmentally contaminated ("brownfield") sites through generous tax incentives and liability protection for owners and developers. Site owners and developers are considering them "found" assets, and the law firm of Phillips Nizer is creating opportunity by matching sellers with developers, advising its clients how to leverage tax credits with other available programs, minimize their potential liability through the use of insurance products and other techniques, source and secure financing for these projects.

Uncover hidden opportunities by:

- learning how federal and state remediation programs can help you recoup site cleanup and hard costs associated with re-development
- understanding program requirements and benefits, both tangible and intangible (e.g. "good corporate citizen" goodwill)
- investing in the remediation and redevelopment of contaminated property.

### **Environmentally Challenged Properties – Making It Work Economically**

Brownfield sites are often an economic albatross for communities and a major problem for industrial corporations. For municipalities, Brownfield sites create blight, generate little or no tax revenue and can be a menace to the health and safety of neighborhoods. For industrial corporations, there is a continued cost of ownership, the liability of cleanup, a potential balance sheet nightmare due to Sarbanes Oxley requirements, and the ultimate question of use and financial viability. Hence private-sector lenders don't provide capital for fear of chain of title liability and developers understandably won't take on the financial, environmental, legal and regulatory risks of redevelopment. So what are the solutions if any?

This session will discuss the state of the market, development and environmental clean-up strategies, risk management, teaming concepts, innovative approaches and present examples of both successful and not so successful projects.

Key learning points:

- What you need to think about when considering plan development
- Innovative solutions from experts in the field
- How to minimize risk
- How to extract as much value out of a difficult situation

### **Nanotech Materials for truly Sustainable Construction**

A revolution is underway in building materials, and you can't achieve green, sustainable buildings and interiors without it. Surprise: the future is here--many products are already available and you can use them now. In this 60-90 minute seminar you will learn about: stronger, lighter nano-steel; translucent nano-concrete; ultra-low-energy nano-lighting; flexible nano-solar panels; insulating nano-glass; waterproof nano-drywall; amazingly durable nano-coatings & paints, dirt-proof fabrics & furnishings, and more. This is a non-technical seminar illustrated with actual as-built case studies that spell out economic benefits. It was originally presented at the CoreNet Global summits in Philadelphia and Lisbon and will be featured again in Orlando. The content changes every time to add new materials and fresh case studies. The session is organized by Remington Partners, NanoNexis, and IA Interior Architects.

Increase your competitive edge by:

- learning about the emerging field of nanotech materials - "smart" materials created through molecular manipulation
- discovering how nanotech materials have lowered costs and improved performance in actual installations
- improving work environments with electronic fabrics, mold-proof ceilings, and flooring that is impervious to dirt and more.

NOTE: This presentation is updated frequently to reflect rapid advances in available technologies and typically includes regionally appropriate case studies and cost-benefit analyses.

### **Sarbanes-Oxley**

Wall Street holds corporations accountable to quarterly profits. Sarbanes-Oxley now holds corporations accountable for reporting process, procedures, accuracy and comprehensiveness. Real estate is often the second or third largest income statement expense and balance sheet asset, without consideration of the liabilities of lease obligations or the market value of owned real estate. This is an advanced presentation that will provide an overview of Sarbanes-Oxley, as well as, new challenges, interpretations and guidance from FASB and the SEC plus will briefly touch on international views.

This presentation will cover:

- An overview of Section 404 of the Sarbanes-Oxley Act of 2002

- The most common control deficiencies
- The major components of risk management
- The value of SOX to creating sustainable benefits

### **Sustainable Materials with Nanotech Construction**

A materials revolution is underway, and you can't achieve real sustainability without it. Cabot Corporation provides a non-technical overview of commercially viable nanotech materials in use right now.

Increase your competitive edge by:

- learning about the emerging field of nanotech materials - "smart" materials created through molecular manipulation
- discovering how nanotech materials have lowered costs and improved performance in actual installations
- improving work environments with electronic fabrics, mold-proof ceilings, and flooring that is impervious to dirt

### **USAA's New Sustainable Village**

USAA's new campus in Phoenix, Arizona, successfully integrates complex business requirements with sustainable community objectives. This targeted mixed-use development incorporates office space and live/work opportunities into the City of Phoenix's "nodal village" concept.

Key learning points:

- Scenario-based master planning reveals new and different opportunities.
- How to build consensus and executive buy-in for a new kind of built environment that supports corporate social responsibility objectives.
- How to build flexibility into a master plan in order to enable continuous enterprise agility.

## **TECHNOLOGY & RESOURCES**

### **CoRE 2010: The Role of Technology and the Web**

***What will the real estate technology marketplace look like in 2010 and what are the implications for corporate real estate executives?***

Innovation and adoption of technology is a driving force in the networked world. The changing nature of work, the role of place, and new models for service delivery are all being transformed by the viability of new and exciting technologies, many of which we have not yet seen.

This fast-paced tour of the innovative strategies that organizations are implementing now to deliver on the technology promises of recent years will inspire and challenge you. Examples of innovative practices by GSA, Nokia, the Institute for the Future, Cisco and Microsoft will be noted.

Corporate Real Estate 2010 (CoRE 2010) is the latest proprietary research and leadership development initiative of CoreNet Global. It projects that the changing business environment will necessitate changes in future real estate practices with resultant implications for the corporate real estate role. Referenced in top publications including The Wall Street Journal and the National Real Estate Investor, CoRE 2010 is supported by research from more than 80 national and global companies and validated by a Gallup Survey commissioned by CoreNet Global in 2004.

### **CoRE 2010: The Role of Technology and the Web -- A Real Time Update**

Things have changed drastically since the initial CoRE 2010 report. Innovation and adoption of technology remains a driving force in the networked world. However, the changing nature of work,

the impact of experienced end users, the role of place, and new models for service delivery are all being transformed by the viability of new and exciting technologies, many of which are already being implemented. Key questions to be addressed:

- What does the real estate technology marketplace look like now?
- What will it look like in 2010?
- What are the three structural changes impacting change?
- What personal productivity tools are invading the workplace?
- What companies are examples of how to implement low cost/highly effective initiatives
- What are the implications for corporate real estate executives?

This fast-paced tour of the innovative strategies that organizations are implementing now to deliver on the technology promises of recent years will inspire and challenge you. Case Studies of innovative practices by GSA, Nokia, General Electric, The Institute for the Future, Cisco and Microsoft are but a few that will be noted.

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### **Integrating Real Estate Businesses: The Stakeholders' Perspective**

Companies all across the real estate industry are integrating their businesses more than ever before and at a much faster rate. Corporations are issuing RFPs to service firms requiring expanded technology services and compliance with Open Standards Consortium for Real Estate (OSCRE) standards. Owners are linking their transactions and financial reporting with information being shared with brokers, appraisers and lenders. Architects and facility managers are using the same information to design and manage buildings and building systems. All this is being conducted using technology standards being built by OSCRE in collaboration with major companies, industry associations, and other standards bodies.

This will be a highly interactive session in which OSCRE members will explain their perspectives on how business is being conducted today and what it will look like in the near future. Using the example of a corporate need for space, they will show how that requirement goes to market, how a transaction is managed, how brokers and owners participate and benefit, how valuation, financial reporting, and financing are all integrated, and how this links into the management buildings, space, and portfolios...all using OSCRE standards.

Key learning points:

- Use of OSCRE standards today
- The benefits of standards to each stakeholder, including you and your business
- How OSCRE is building consensus and driving adoption across the industry

### **Integrating Technology – A Working Model**

This session will address the specific integration issues facing corporate real estate. Integration means combining various parts so that they work together and for a corporation, integration is an activity to bring different products and services together into a smoother working environment. The trend of mergers and the increasingly global nature of customer relationships and vendor partnering create the urgency for integrating data, processes and services to be nimble and responsive.

USAA will discuss an initiative to improve its real estate systems, focusing on facilities management, space management, workflow and procurement. USAA is becoming more process-centric all the time, looking at the effect of a transaction holistically across the enterprise.

Key learning points:

- The role of technology and the web in enabling work
- What you can accomplish today with readily available technologies
- What the key success factors lead USAA in achieving its goal
- The value achieved from an integrated viewpoint

## **Introduction to OSCRE**

You know your team has taken the proper steps necessary to implement and integrate best-in-class or ERP technology systems designed to enable your organization to successfully perform required business processes and exchange information between a variety of internal and external supply-chain stakeholders. And yet you still find the cost in labor resources and time not on par with the quality of data you feel you should receive. Furthermore, you and your peers agree there's significant variance in internal and external benchmarking analysis of key performance metrics. This business problem is consistent across the industry regardless if you use real estate as 'resource' to do your core business or as a 'provider' in the supply chain.

If you've invested in the research necessary to discover the root cause of this issue, you most likely have reached the same conclusion members of the Open Standards Consortium for Real Estate (OSCRE) have, which is the Real Estate industry doesn't have a common language to draw from to use in our technology systems necessary to provide apples-apples results.

We hope you'll join us for this important and timely presentation provided by OSCRE's CEO Andy Fuhrman who will provide a no-spin discussion covering the following topics:

- Why it's important for you to understand OSCRE's holistic view of the Real Estate Supply Chain;
- What OSCRE and other Standard Development Organizations are doing to help improve the industry;
- Why Real Estate Data Standards are critical to the success of your business and the industry;
- Cost to the industry and your organization not to have standards;
- Why now is the right time for the industry to work together and why other previous efforts failed;
- A mid-level, non-technical view of current OSCRE Working Groups and the methodologies used to create data standards;
- Participation with OSCRE
- Open Discussion

## **WORKPLACE STRATEGIES**

### **Against The Elements: Managing Disasters Affecting Commercial Real Estate Best Practices in Disaster Planning**

Newmark Knight Frank Global Management Services will share their disaster preparedness planning initiatives from the perspective of their experience with hurricane Katrina and the London transit bombings.

Mitigate economic loss and respond effectively through:

- adequate preparedness
- effective and centralized communication
- quickly locating your employees and assessing damage

## **Branch Convergence: Centralizing Real Estate at AAA**

Auto Club Group (AAA) has effectively centralized its real estate functions via an integrated web-based platform that transforms lease, transaction, and facilities data into strategic information. They went from a fragmented, paper-based record system to a fully automated system in one step, avoiding costly short-term solutions. A comprehensive change management program and effective communication eased the transition.

Achieve process efficiencies in your organization by:

- Integrating business process refinement with modular information system implementation to shorten time-to-results
- Integrating financial information into your enterprise-wide real estate information system
- Leveraging real-time key performance indicators (KPIs) for continuous improvement

## **Change Leadership: Strategy, Implementation and Best Practices -- An Introduction (Abridged EDP Seminar)**

Research shows that up to 70% of all organizational change initiatives fail to meet their objectives. This has led to the emerging recognition that the ability to successfully lead organizational change is a specific leadership skill set and set of best practices.

This workshop centers on how to develop a change management strategy and how to successfully lead an implementation team, including:

- Defining change and transition
- Choosing and defining what needs to change
- Establishing a sense of urgency for the change
- Understanding resistance to change
- Getting and managing political support
- Gaining cross-departmental buy-in and participation
- Developing a communications and buy-in plan
- How to organize and lead the transition implementation team
- Developing change management strategy
- Project management of timelines and budgets

## **Change Management: The New Corporate Real Estate Skill**

As the interdependence between corporate culture, corporate objectives and workplace strategy continues to intensify, change management skills are a key success factor for every corporate real estate professional.

Expand your change management skill set by:

- recognizing the role skill plays in the long-term success of change programs
- examining how process design is as important as skill
- understanding how change processes are affected by other key success factors.

## **CoRE 2010: Enterprise Leadership**

### ***Learn the Business of the Business and How to Get There***

This program will examine how enabling work in a networked enterprise will require capabilities such as in-depth general business knowledge, a high level of financial acumen, business process improvement skills, and collaborative leadership capabilities which can be applied cross-functionally at all levels within the enterprise and with a highly networked service delivery network. These skills, coupled with access to real-time, enterprise-level data, will be critical to

identifying and fixing broken business processes and integrating functional areas on a global, networked basis.

Program Highlights:

- Examples of innovative practices by Deutsche Bank will be noted
- Level of business and financial acumen required
- Knowing the "business of the business" and how to get there
- How to effectively provide leadership at the C Suite level, in cross-functional operational management teams, within functional teams, and with the extended service delivery providers
- What is meant by business process improvement - and how to embrace it
- Other non real estate competencies and skills required in 2010

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**CoRE 2010: Integrated Resource and Infrastructure Solutions (IRIS)**  
***How Can You Best Leverage Infrastructure Investments Across Functions?***

This program will address key findings and the latest trends on the emerging discipline of Integrated Resource and Infrastructure Solutions (IRIS). The material to be presented is based on more than 20 interviews with senior real estate and infrastructure leaders and addresses why IRIS is being adopted as a best practice by leading firms across multiple industry sectors.

At the most basic level, IRIS is the coordination of functions such as CRE, HR, IT, Marketing, etc. in new ways to help corporations identify and implement strategies for lowering the breakeven cost of doing business. At this level, IRIS creates efficiencies from leveraging infrastructure investments across functions. On a more strategic level, IRIS promotes innovations at the intersections of these functions that have strategic implications.

Program Highlights:

- Examples of innovative practices by Nortel Networks will be noted
- The forces driving change and the business rationale for integrated infrastructure management
- Components and characteristics of successful infrastructure initiatives
- How firms are achieving integration at various levels
- How to align your infrastructure with the needs of the business
- How to build the business case for strategic infrastructure investments
- Impact of this trend on the service provider industry

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**CoRE 2010: The Changing Nature of Work and the Workplace**  
***How Will You Optimize Work and the Workplace of the Future?***

By 2010, the enterprise will be an agile, sustainable network, built on an integrated infrastructure that is capable of supporting the continuous adjustments needed to balance and optimize work. Work will be done by a mix of free agents, part-time workers and full-time employees working independently and in teams across time and space to leverage the knowledge and talent of a global workforce. As a result, the role of the workplace will be transformed as traditional boundaries become irrelevant.

Key learning points:

- Examples of innovative practices from GSA's Workplace 20.20 will be noted.
- How the nature of work is evolving with regard to process structure and outcome definition and the trend toward an increase in "knowledge work."
- How resources are coordinated within a workplace strategy to enable work.
- Aligning workforce and workplace, including alternative workplace solutions.
- Shifting expectations of both workers and employers and the "social contract" or lack thereof.

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### **Creating Corporate Value through Workplace Strategy—an Introduction (Abridged EDP Seminar)**

This workshop explores the critical alignment of workplace strategy with business strategy to improve productivity in the workplace and impact the bottom line. Effective corporate real estate management develops workplace strategies based on an understanding of the relationships among physical space, worker/business unit productivity and corporate culture. How the various components of real estate operations -- portfolio, location, design/layout, adjacencies, alternative/virtual officing, work process, technology --can affect this strategy are reviewed. The integration of HR, IT, finance, and real estate issues is examined in this context.

The workshop examines the ultimate test of a successful real estate/workplace strategy: the ability to attract, enable, and retain a productive workforce within given constraints. Finally, applicability of these concepts to work environments -- including knowledge work, manufacturing, and the service industry -- is discussed. Time permitting, business cases and examples may be covered from organizations such as Nortel, Compaq, Reynolds & Reynolds, the General Services Administration, Fidelity Investments and other Fortune 500 companies.

Workshop Overview

- A climate of extraordinary change
- The shifting role of the corporate real estate executive
- Starting with a strategic plan
- Responding to agile business models
- Nature of the organization
- Nature of work
- Designing the right workplace
- Managing change

What's In It For You?

- Understand the demands of a changing workforce and the needs of the knowledge worker.
- Examine alternative methods for evaluating workplace needs.

- Understand how the workplace can become a tool in achieving the business goals of an organization.
- Ability to become more of a strategic partner with executive management.
- Ability to demonstrate tangible impact of workplace strategy on the bottom line.

### **Defining and Measuring the Impact of Workplace Image**

What a workplace communicates - its "image" - is increasingly seen as a legitimate way of using real estate for competitive advantage. The U.S. General Services Administration and Fidelity Investments have each implemented workplace image initiatives and have developed metrics and tools to explain how image relates to broader organizational performance, as well as customer and employee perceptions.

Create a competitive advantage for your organization by:

- Understanding how workplace image affects customer trust, comfort, and perceptions of an organization's products and services
- Implementing a process to measure the impact of image on brand value and workplace performance
- Using workplace design to communicate the organization's goals and functional objectives.

### **Developing a Distributed Workplace Strategy**

Emerging trends will greatly influence the workplace of the future - fast-paced technology changes, new economic pressures and new user behaviors and expectations each introduce new realities that many organizations are just beginning to contemplate.

The program presents a best-in-class case study of a distributed workplace methodology, which will summarize strategic intent and will highlight a sound justification for introducing concepts to ensure better-managed costs and better-leveraged facilities, along with new models for delivering support services and ensuring successful project delivery.

Outline of presentation:

- Emerging trends in the workplace
- Why a new workplace blueprint?
- Connecting the business and the RE strategy
- Overview of issues and obstacles
- The evolving workplace strategy
- What it was and what it is and how it works
- The integration of people, service, space, technology and local cultures

Key learning points:

- Emerging global trends in corporate goal-setting
- Aligning distributed workplace strategies to corporate cost and flexibility goals
- Space models for distributed workforces
- Identifying barriers to knowledge worker productivity
- Performance metrics that measure workplace success

### **Enterprise Alignment -- An Introduction (Abridged EDP Seminar)**

The theme of this workshop is "the business of Corporate Real Estate (CRE) is the business of the business." Knowing the business's core drivers and processes is the foundation for developing real estate portfolio and workplace strategies. To be successful, CRE executives must become more proactive, process-oriented, strategic, and linked to business unit goals.

Today, effective CRE management goes well beyond delivering facilities on time and within budget. It requires understanding how the real estate portfolio can match and serve the enterprise's business model, work and culture. Effective CRE executives develop asset portfolio scenarios and workplace strategies based on an understanding of the relationships among physical space, worker/business unit productivity, corporate strategies, key business drivers and corporate culture.

To accomplish this requires extensive client relationship management with business units plus integrating occupancy, connectivity, financial acumen and management policies. CRE executives must have a firm understanding of how individuals and teams actually do their work, and how that work may, in turn, be influenced by this bundle of infrastructure and support services.

How You Will Benefit:

- Understand and get the information you need about business units through formal relationship management, internal corporate partners, use of corporate documents, web sites and analytic tools
- Case Studies that reveal strategies for selling a strategic corporate real estate role to business units; and, changing a business's view of your role in CRE to strategic business partner from an order taker
- How to develop an action plan for working more effectively with business units to develop real estate strategies

### **Going Mobile: Motivations, Strategies, Results**

Review results of successful mobile programs and why they are successful, including best-in-class examples from Agilent, Sprint and BearingPoint. Discuss alternative strategies for going mobile and how they can greatly reduce occupancy costs and significantly increase employee productivity.

Key learning points:

- For mobile workers, a sense of belonging and engagement are fundamental success factors
- Consider solutions inside and outside of your built environments
- Leading by example continues to be a strong influence in achieving and sustaining workplace change

### **Integrated Resource and Infrastructure Solutions (IRIS) – Strategies For Unlocking the Next Level of Value**

Where will the next generation of innovation and break-through thinking come from in our industry? The research of CoRE 2010's Integrated Resource and Infrastructure Solutions (IRIS) team suggests that the answer may lie at the "intersections" of Real Estate and other functions such as HR, Technology, Finance, Marketing and beyond. The IRIS team found that when executives from these and other functions align and collaborate around shared corporate goals and objectives, new solutions and strategies emerge that go well beyond what any one group might have produced on their own.

Dan Boutross, Director of RE Strategy and Planning at Sprint, will share the integrated approach to enterprise portfolio strategy that is the driving force behind Sprint's new generation of enterprise solutions. Dan will give real-world, "day in the life" examples of the management, collaboration, and implementation methods his integrated team uses to deliver breakthrough solutions for Sprint's most challenging workplace and portfolio issues.

Key learning points:

- Gain insight into ways that corporate real estate executives can "get a seat at the table" with corporate executives as they focus on productivity and key infrastructure initiatives
- Position corporate real estate as a key player, if not the leader to develop innovative integrated strategies
- Understand priorities and "mindsets" of IT and HR colleagues to communicate more effectively and identify enterprise level synergies and solutions
- Organize and facilitate cross-functional teams for enterprise planning, project development, and "breakthrough" strategy development
- Explore the specific techniques, processes and methodologies that others have proven to be effective in facilitating "innovation at the intersections"

### **Organizational Alignment of Corporate Real Estate within the Enterprise**

This one-hour workshop provides an overview of the various elements that can influence organizational alignment of the corporate real estate (CRE) function. Participants will review / discuss the pros and cons associated with many of the typical CRE function reporting structures. Potential reporting structures will also be discussed in the context of CRE function maturity, to explore how certain organizational alignments and corporate culture can influence the development of CRE. Lastly, participants will learn about numerous opportunities for CRE to impact shareholder value.

Gain insights into:

- Implications associated with certain CRE reporting structures
- Leading practice examples of optimal organizational alignments
- Performance measures associated with various reporting structures

### **Strategy & Planning - An Introduction (Abridged EDP Seminar)**

Most corporate real estate users and service providers are in a corporate environment that demands networking, flexibility, and workplace strategies that are responsive to changing business objectives. Are you keeping pace?

Strategic planning involves the development of short- and long-term strategies used in today's corporate environment to receive optimal portfolio performance. Without a sound strategic plan, the pieces of the puzzle – demand forecasting, lease vs. own scenarios, occupancy cost planning, and asset management – will not fit together.

This workshop explores the appropriate metrics, communication, and structure that various corporate real estate firms are utilizing. It will provide you with a comprehensive set of strategy and planning tools to help you raise the awareness of corporate real estate's impact on the business and corporation.

This workshop will benefit corporate real estate executives and service providers whose goals are to expand their ability to create value, create cost savings strategies, support senior management and business units, as well as effectively communicate and implement strategic plans.

Program Highlights:

- Acquire a basic understanding of the strategic planning process and its critical importance
- Present a succinct, quantitative value proposition to senior management
- Engage in planning simulations and case studies geared for varying corporate objectives and financial priorities
- Develop understandings of how to align real estate strategies with operational objectives
- Acquire the skill of proactively achieving optimum portfolio performance through implementation of strategic plans

- Review examples of communication case studies and lessons learned

### **Strategy Alignment: Defining Real Estate Strategies in the Context of Organizational Outcomes**

An increasingly sophisticated body of theory and practice has emerged over the past 20 years among those working to define the role of facilities and real estate in enhancing corporate business strategy. The purpose of this presentation is to discuss the Strategy Alignment Model, which is a framework for directly linking real estate initiatives with core business strategy and measuring success in terms of organizational outcomes.

The model is comprised of three elements: 1) a content map which is used to craft, measure and display an aligned organizational real estate strategy as a series of cause-and-effect relationships; 2) a change management model which provides a structure for defining who's going to be involved-and why, how, when, where, and for what purpose-in every project assignment; and 3) a benchmarking system which facilitates identifying best practices that offer competitive advantage.

The principles of the model will be described in the context of several case studies with SC Johnson, Snap-on, RR Donnelley, Dade Behring and Johnson Diversey. In these projects the planning team tied specific portfolio, site, facility and workplace process and space concepts to core business strategies and measures related to:

- Recruitment and retention of the best people;
- Managing organic and acquisition growth;
- Expanding the customer base, markets, products and services;
- Refining organizational structure and culture;
- The development of branding and identity programs;
- Enhancing workflow, communication and speed to market;
- Supporting internet and related transformational technologies, and
- Reducing costs and controlling risk.

Among a number of lessons, this session will:

- describe the theoretical underpinnings of the model, which are based on the application of a business framework to real estate, rather than an architect or broker scheme imposed on business;
- describe research from 175 Fortune 500 companies that provides empirical evidence of facilities/real estate issues which are correlated with specific core-business strategies;
- provide a step-by-step description of how strategy alignment has been used by the case study organizations mentioned earlier as well as by dozens of other companies;
- describe change-management activities that facilitate participation and buy-in of internal and external stakeholders, and.
- suggest value-added best practices that challenge commonly held beliefs about benchmarking.

### **The Virtual Workplace: Migrating from the Fringe to the Mainstream**

The technology revolution of the past 20 years has provided tools for new ways of working that transcend time and place, leading to the evolution of new organizational structures to enable complex virtual work. In today's global economy, fueled by a technologically connected global workforce, tremendous benefits can be derived by effectively implementing anytime/anywhere workplace models that facilitate a workforce collaborating around skills and need, regardless of location and time.

The purpose of this case study is to explore the drivers, issues, challenges and solutions that several large organizations are experiencing in their efforts to embrace new workplace strategies incorporating virtual work as a critical success factor.

Key learning points:

- What virtual work issues are common and which are unique?
- What clearly works and what doesn't in establishing a successful virtual work strategy?
- How is success measured when migrating from a centralized to a dispersed working model?
- What is the impact of virtual work on the bottom line, organizational culture, human capital strategy, real estate strategy, technology, facilities design, training, work/life balance, sustainability and social responsibility?

### **Workplace as a Competitive Advantage**

A shift to "Anytime/Anywhere Work" is the fundamental change the Nature of Work is undergoing today. Generational differences, cultural diversity, technology platforms, security, doing more with less, mergers/acquisitions/downsizing, optimizing resources, measuring performance - all these factors add layers of complexity and create huge opportunities for the Workplace. These factors also require a different kind of Workplace-Making. Business success is enhanced or inhibited by the degree to which Corporate Real Estate professionals understand the Nature of Work, its key attributes and implications for facilities, technology and policy.

NELSON has been working with various clients in helping implement an Effective Work Practices / Alternative Workplace Environments (AWE) programs across the global markets. Various case studies from Fortune 100 clients are used to demonstrate the six sigma-based tools that are used to define, measure, analyze and improve the program. The success of Alternative Workplace Environment initiatives are tracked with help of surveys, measurement scorecards and Key Performance Indicators. The measures are projected to deliver significant occupancy saves for the corporation with potential increase in associate satisfaction and productivity and reduction in recruiting time.

The workshop provides valuable lessons for CRE organizations on how to support anywhere anytime work for knowledge workers, understand the integrated approach between Workplace, Technology, and Personnel to deliver successful results, manage an effective change management process, and deliver positive results for the shareholders, associates and customers.

### **Workstyles: Driving New and Innovative Space Use Models**

Explore the process of creating and delivering new workplace paradigms at Herman Miller. Defining individual Workstyles – using both the Myers-Briggs Type Indicator® and work process assessments – has enabled Herman Miller to offer a variety of workplace choices that reduce space, increase satisfaction, and enable innovative ideas to percolate.

Create an effective workplace strategy by examining:

- the impacts of mobility on the existing workplace
- Workstyles and the influence of personality
- the relationship between workplace strategy and space allocation models.