

COVID-19: Workplace continuity Preparing for re-entry and reimagining the workplace

JLL Consulting

April 16, 2020



Sundar Nagarajan
Americas Lead
JLL Consulting
Sundar.Nagarajan@jll.com



Peter Miscovich
Managing Director,
Strategy & Innovation
Peter.Miscovich@jll.com

COVID-19 Creates the Need for Workplace Continuity



Crisis Management

Overall coordination of the response to a crisis

- Coordinate and manage the response to the crisis
- Establish priorities
- Allocate resources
- Manage operational teams

Business Continuity Plan

Safeguard day-to-day business

- Business objectives
- Business risk and impact analysis
- Business continuity strategy
- Test and audit maintenance

Disaster Recovery Plan

Recover after the event

- Scenario planning
- Business strategy and operating model
- Real estate strategy
- Disaster recovery strategy
- Operational resilience

Workplace Continuity

Workplace Continuity Priorities from March 19th Webinar

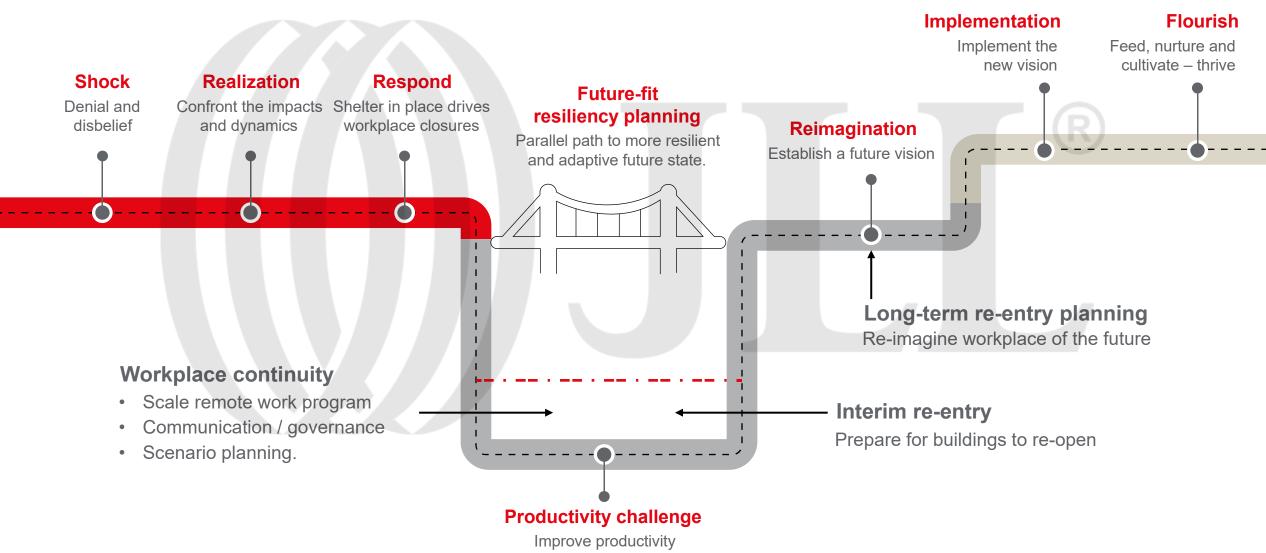


Options	# Selected	% Selected
Preparing COVID-19 "what if" scenarios	196	35%
Building strong communications mechanisms and protocols	192	34%
Achieving remote work scalability	124	22%
Assessing workplace continuity	25	5%
Leveraging alliance partnerships, service providers and vendors	21	4%
Ensuring alignment to enterprise risk management	3	1%
Total	561	100%

Poll question from March 19 webinar

COVID-19 Client Experience Journey





© 2020 Jones Lang LaSalle IP, Inc. All rights reserved.

Interim Re-entry Considerations



Landlord

- Building capacity/ entry restrictions
- Social distancing/elevator and common areas
- Cleaning protocols
- Modification of amenities, selective re-opening
- Building entry policies/security

Government

- Shelter in place
- Business and public area shutdowns
- Overall re-entry strategy

Re-entry

Individual

- Ultimate decision maker on re-entry
- Must be confident in health and safety

Occupier

- Office capacity/ entry restrictions
- Social distancing/ floorplan adjustments
- Cleaning protocols
- Modification of amenities, selective re-opening
- Office entry policies

Understanding the Current COVID-19 Dynamics



Pharmaceutical intervention (vaccination to prevent or medicine to cure) for COVID-19 not yet available



Shelter-in-place and social distancing are only suppression strategies to keep the number of cases below healthcare system capacity; and not a cure

Adaptive triggering (i.e. cycle between lockdown and relaxation) will continue to balance health risk and economic risk until a vaccination and / or medicine is available.

Reimagining a New Paradigm



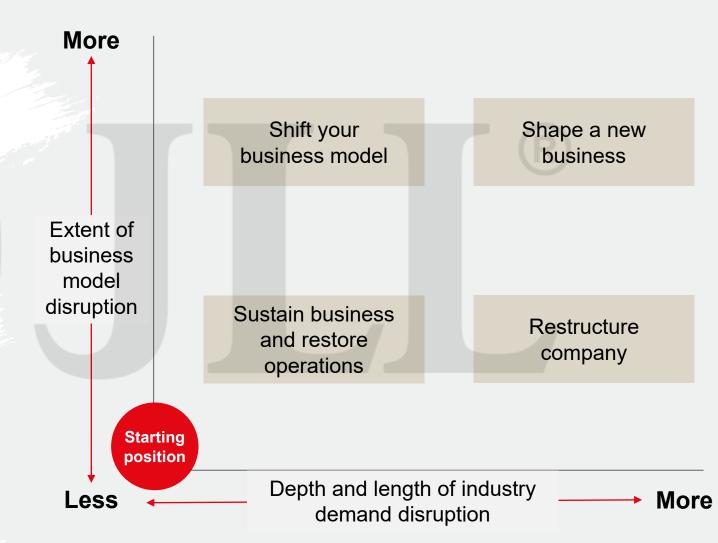


© 2020 Jones Lang LaSalle IP, Inc. All rights reserved.

What-if Scenarios for Reimagination



- Gain a realistic view of your starting position
- Develop scenarios for multiple versions of your future
- Establish your posture and guiding vision
- Determine actions and strategic moves that are robust across scenarios
- Set trigger points that drive your organization to act at the right time.



Source: Getting ahead of the next stage of the coronavirus crisis – McKinsey & Company

COVID-19 Workplace Continuity Scenarios



External environment

- Countries in lockdown
- · Social distancing strong enforcement
- Low / intermittent level COVID-19 testing
- Transmission rate > 1
- Corporate offices open (very limited)
- · Social distancing moderately monitored
- · Moderate level of COVID-19 testing
- Transmission rate <=1
- Educational facilities / Schools open
- · Corporate offices open / Monitored
- Social distancing limited (as needed)
- · High level of COVID-19 testing
- Transmission rate < 0.5

100% WFH

100% WfH

100% WfH

60% WfH

80% WfH

100% WfH

40% WfH

60% WfH

80% WfH

- Few higher risk employees
- Workplace environment compartmentalization possible and COVID-19 risk well-managed
- Minimal Personal Protection Equipment (PPE) required.
- Some higher risk employees
- Workplace environment provides moderate level of spatial compartmentalization
- Some Personal Protective Equipment (PPE) required.

- · High number of higher risk employees
- Workplace environment with NO compartmentalization possible
- Personal Protection Equipment (PPE) required.

WfH = Work from home

Workplace environment

© 2020 Jones Lang LaSalle IP, Inc. All rights reserved.

9

Reimagination: The Enterprise of the Future

Digital Elastic Workplace Ecosystems* Liquid CRE Portfolio Strategies **Workflows** Workforce Workplace **Portfolio** Workspace Building Digital Engagement Intelligent Digital Experience **Flexible** Fulfillment & Delight Sustainable Integrated AI + Augmented Agile + Collaborative Always-on Well-Being, Health Agile Cognitive + Immersive + Flexible Efficient Data-driven Adaptive & Protection Digital + Mobile Smart Distributed **Optimized** Asynchronous Performance Safety Robotic + Virtual Resilient Adaptive **Brand** Culture Values Health Adaptive & Responsible Enterprise and Real Estate

^{*2020} Accenture Productivity in Uncertain Times through Elastic Digital Workplace Research @ March 2020

Requests we are hearing from Clients



- ✓ Workforce re-entry strategy
- ✓ Facility and building re-opening protocols
- Workplace and common area adjustments for social distancing
- ✓ Re-entry program management
- ✓ Training workforce and/or staff on re-entry expectations
- Building confidence with individuals on health and safety
- ✓ Reimagination





Thank you