Integrating Project Management and Architectural Services to Optimize Workplace Solutions

By Robin Weckesser, CEO, a3 Workplace Strategies

The modern workplace is undergoing a dramatic transformation as Corporate America strives to safely return to the office during the lingering pandemic. How to reconfigure office space to allow for workplace distancing as well as factor in an expanding remote workforce are critical considerations in these uncertain times.

Whatever the "new normal" looks like, a healthy and welcoming workplace will always be a necessity. Indeed, office transformation precedes the pandemic, involving the creation of environments that promote collaboration, increase productivity, and maximize ROI. Fundamental to this dynamic is appreciating that *one size doesn't fit all.*

Today, the stakes for companies in the Bay Area and beyond are increasingly high, with millions of dollars and survival often lying in the balance. Not surprisingly, companies are often confused about how to proceed and who to call for help.

Optimizing workplace solutions can be daunting; it requires the understanding of the connection between space, work process, and staff productivity. The goal is to optimize workplace solutions from start-to- finish, no matter how big or small the project…to align the corporate vision and objectives and deliver *a place that works, not just a workplace.*

Teaming Up for Success

In this environment, a frequent question is: *Who is best-suited to serve as the right workplace consultant and optimize clients' chances for success?* Increasingly, the answer is: an experienced, independent, integrated project management (PM) team that includes architects as a key players.

Let's review different workplace approaches and roadmaps available to clients.

- **In-house.** Some companies believe they can save money by managing workplace development in-house. This may work for projects that aren't large and complex. But for more substantial and complicated assignments, companies rarely have the skillsets and resources to manage projects in-house.

- **Architects and General Contractors.** Architects and general contractors are often vital players on the workplace team but generally not the right people to *manage* the entire process. Often, conflicts of interests arise involving changes,

costs, and overruns without an objective third party providing oversight and a strategic perspective to protect client interests.

- **Real Estate Firms.** Traditional real estate firms are worth considering if clients need integrated brokerage and project management. If not, the PM services from real estate firms may not be their primary focus. What's important is which consultant is the most specialized and experienced in PM.

- **PM Firms.** *The preferred choice* is typically independent project management firms, integrated with architects, which provide a broad perspective with objective project oversight from start to finish. This starts with strategic planning and includes managing all vendors, all budget items, and all phases of the assignment. Again, an essential part of the team, as a subset of PM, is a strong architectural component, often complemented by construction management.

Mining the Strengths of the PM and the Architect

The skillsets of architects are clear: programming, drafting, designing. The best architects combine advanced technology and creativity to create space that is functional, sustainable, and distinctive. They are sophisticated and innovative, but they also bring old-fashioned skills like listening and communicating.

Project management firms like a3 recognize the magic inherent in the progressive architect's DNA. And we accordingly give architects the room to "do their thing" under the oversight of the lead PM.

Working with architects, project management firms strive to:

- Protect clients' interests and deliver workplace solutions that add value.
- Be strategic, objective, and transparent, saving clients time and money.
- Align business and real estate goals.
- Manage the process from visioning to occupancy.
- Maintain sensitivity to the needs of a multi-generation workplace.
- Create environments that promote collaboration, private offices, and "hybrid" space, as appropriate.
- Provide change management to educate and train staff about changes.
- Help organizations attract top talent, improve productivity, and enhance morale.
- Lead the team of architects, GC's, furniture, IT, AV, security, movers, etc.

Project managers bring a broad, strategic perspective to the overall process. PM's not only understand design, construction, engineering, IT/AV security, and furniture procurement, but also the *business implications* of commercial real estate projects. They view solutions in a larger context that includes lease terms, business objectives, and other value-added client services.

Part of this equation—and key to project success—is that PM, often with the architect's input, ensures that a realistic budget is established at the project's onset. The "all-in" budget will allow the PM firm to carefully monitor the design and assure its alignment with the budget. To prevent surprises, the firm refines and manages the project budget,

including the entire cost spectrum: permitting, design, construction, IT/AV, security, furniture, relocation, and other related expenses.

Project Phases

Overall, the PM model brings value through a comprehensive approach that involves four project phases:

- Real Estate/Property Search
- Preconstruction, Programming, and Design
- Construction
- Close-out/Move-in

The Future: Contemporary Project Management

Looking beyond the pandemic, the industry landscape will keep changing, and corporate needs will force us to look at new paradigms.

For example, let's consider changing demographics. Today's workplace often contains five generations working together, including Baby Boomers, Millennials, and Gen Z—all of whom have different mindsets and skillsets. Baby Boomers and senior managers in particular often find it hard to adjust to new technology and environments that don't cater to entitlement and privacy issues.

This shift has caused project managers, facility managers, architects, brokers, and construction managers to think differently about their roles.

For many years, project managers have fulfilled a critical, albeit more narrow, role. Overseeing the work of vendors and integrating services, they were responsible for staffing, budgeting, scheduling, and implementation, including IT, AV, security, furniture, and relocation management; they seldom were involved in the big picture, including visioning, strategic planning, and product delivery.

Today, we need to view the role of the PM through a wider lens and appreciate that all PM firms aren't created equal. Enter the *Contemporary Project Manager (CPM)* who has the following attributes:

- The expertise of a mechanic *and* the much broader skills of a holistic engineer.
- A client partner and advocate, providing non-biased counsel and leadership.
- An experienced professional who applies lessons of sociology and psychology and is sensitive to different employee demographics.
- One who listens and has excellent communication skills.
- One who combines strategic planning and tactical know-how.
- One who understands infrastructure, operational systems, and permitting.
- One who aligns real estate with corporate objectives.
- One who is part architect, part space planner, part interior designer, part visionary.

- A coach/facilitator/leader who collaborates with staff and vendors… but is also nimble enough to overcome barriers and strong enough to push for solutions that meet the client's best interests.

As part of today's holistic approach to project management, the ideal CPM provides integrated services and has excellent partners, starting with architects. CPMs should be involved from the get-go in tenant improvements, lease negotiations, and work letters.

Today's CPMs—and architects—should have the required background. They should be able to say, "Been there, done that."

This begs the need for organizations to be judicious about selecting a CPM, especially as we figure out the new normal.

At the end of the day, it's all about how to enhance your own business while optimizing success for the client. The answer is an integrated approach. A team effort with the CPM serving as captain, but with architects and other parties who are critical to the mission.



a3 Workplace Strategies

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