

# SPACE PLANNING 2021: THE BIGGEST MISTAKES *and How to Avoid Them*



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Achieving operational excellence and having the correct amount of space to do so is becoming an increasingly pressing item on the agendas of Bank CEO's nationwide. With increasing pressure to boost the bottom line, the need to use work space as a recruitment and employee retention tool, fall-out from merger and acquisition activity, and now implications from the

Covid-19 pandemic, there has never been a more prudent time to re-evaluate space usage within your operational areas.

While many banks excel at forecasting and planning, unfortunately, many seem to fall short in providing efficient operations space. Rather than having a calculated space strategy that addresses concerns for the foreseeable future, many institutions operate in a reactive manner rather than a proactive method. How many times have you hired an employee with no place to put them? Have you ever had to turn a board room into temporary offices? Or possibly, have several departments that need to work simultaneously together but are located in two different buildings?

A lot of these inefficiencies and unproductive processes can be solved by going through a well thought out, comprehensive space planning exercise. Space planning forces bank management to take a thorough look at the usage of existing space, current number of employees, and future expectations and needs.



Charts based on the space requirement survey visually outline the data

The first step in space planning is to complete a space requirement survey. This involves a series of questions related to existing conditions, staffing requirements and projections in addition to department adjacencies and workflow. Input from key management members and department personnel during this step is essential to ensure success in the overall plan.

Once the survey is completed, a series of charts and graphs are created which visually outlines the projected number of employees and the estimated amount of space needed to efficiently accommodate them over a ten-year period. This data is paramount in providing management a good summary as to whether current office space is going to be sufficient for achieving existing and future optimal usage of operations space.

In addition to evaluating staffing needs, it is sensible to look at existing technology usage. Are you making the most of technological advancements in the office? Are you reducing the paper load? Technology not only provides efficiency but can also help in space saving initiatives as well. It also drives convenience for employees, cutting the completion time down tremendously on many manual office tasks. This also contributes to a reevaluation of your staffing needs.



*Floor plans and 3-D Elevation for new space*



The final step to any space planning strategy includes analyzing the data and determining whether or not existing space can be configured as to maximize total square footage and accommodate current requirements, as well as future needs, all the while streamlining the organization and creating winning conditions. Here, management will have the necessary data to make the difficult decision of whether to renovate existing space to accommodate the necessities of the organization or whether the organization needs to look at other options to best suit their needs. Either way, the management team will be equipped with the necessary information to make a knowledgeable decision.

So, all of that makes sense under normal circumstances. But what about during a pandemic that has turned the normal work routine upside down? Suddenly you have most of your staff working from home and have no idea when, if ever, they will be returning to the office. In addition, for the workers that remain in the office, a safe environment that includes room for social distancing must be provided.

While nobody has a clear-cut answer on the lasting effects the pandemic will have on the workplace, there are several initiatives to consider when it comes to space planning:

### **SHARED WORKSPACES**

Shared workspace is office space that is shared by many employees but at different times. The workplace is static; the occupants are dynamic. By sharing workspace between employees who may be doing a hybrid of working from home and coming into the office, operational areas can greatly be reduced allowing for reallocation, saving valuable

space from sitting idle.

### **RECONFIGURING WORKSPACES FOR SAFETY**

Both traditional and modern floor layouts will need essential modifications to adapt to the social norms brought on by COVID-19. While some of these changes maybe short-term, some may also be lasting. For the short term, banks can install new or heighten existing workspace dividers, decrease the use of shared workspaces, and even limit conference room capacity. From a long-term perspective, consider widening hallways, increasing your restroom and kitchen footprint, and even replace your on-site storage with electronic storage options to reduce footprint. Finally, consider modular office furniture designs for their ease of flexible configuration needs, and their ability to adjust on the fly to safely maintain distance when needed.

### **TELECONFERENCING ROOMS**

Many organizations have shifted toward more open plan offices and are investing rapidly to maximize office real estate by embracing modern technologies in their flex-use and standard conference rooms. With the new affordability of video conferencing technology, many organizations are creating space where video connectivity can be integrated. Teleconferencing can provide the ability to remotely connect with customers, vendors and fellow staff members working from home.



When it comes to space planning, you have the choice to be either reactive or proactive. Putting together a well thought out ten year space plan does take some time and commitment from management, but in the long run can ensure productivity and operational efficiencies within your organization...plus, it ensures your board room and not your newest employee's office!

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James G. Caliendo is a former bank executive and now President & CEO at the 110 year old design-build and retail services firm. In the past 20 years alone, under Jim's direction, PWCampbell has worked with over 500 financial institutions influencing millions of square feet of retail and operational space to create engaging, impactful and scalable solutions for every sized facility project.