

What to Consider
when Shifting from Private Offices
to an Open Office Plan

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Background

Today, more than 60% of all North American companies use furniture workstations within their facilities (Veitch, Charles, and Newsham, 2004). Open plan workstations offer advantages of cost and flexibility over traditional private offices and can help reduce barriers between employees. To that end, many companies are moving away from facility programs that rely on a high proportion of private offices, and towards a more balanced approach that incorporates both types of office space. This trend is part of a larger shift away from the primacy of the enclosed office, often located on the perimeter wall, to a model in which the private offices plays a subordinated role, moving to the building core.

Of course, the decision to shift toward an open plan approach is never taken lightly. Any substantive workplace change invites real concerns about employee satisfaction and how the new space might affect morale, retention and work effectiveness.

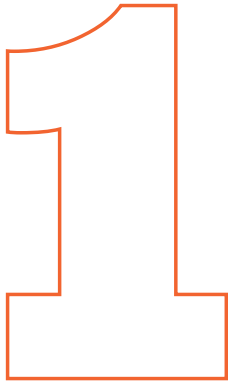
To help shed some light on this process, this paper shares some insights on how to implement a successful workspace transition. We close with general recommendations for design of open plan space.

Issues to Consider

The link between the physical environment and the behavior and performance of office workers has been well documented over the last three decades (Brill, 1987; O'Neill, 2007; O'Neill and Wymer, 2009). One clear theme rings true through all of this research and the real life struggles experienced by facilities teams: change to the workspace, no matter how well-intentioned, cannot be considered in the absence of the larger business/work context. This context includes the emotions and perceptions of people affected by the change, the trade-offs that they perceive making when they “lose” their private office, and the tacit messages sent by the organization as part of the change process.

Thus, based on practical experience, we explore four key considerations for the successful shift from private office to open plan:

- ▶ **Take a holistic approach.** A successful design project must consider other issues which affect employee performance such as rewards, job design, work policies and technology. Realize that workspace design, itself, is one element of a holistic solution – it is not an end in itself.
- ▶ **Anticipate conflicting perspectives.** Individual employees, people with similar job levels and roles, and work groups will have different perspectives on your design solution. When implementing a design or creating standards, think about how your solution will be perceived by different constituents and their potential reactions.
- ▶ **Build-in choice.** A significant amount of research shows that health and performance improves when employees are given choice and control over where, when and how they conduct their work (O'Neill, 2010). A design solution should incorporate the right combination of technology, facility layout, informal and formal meeting spaces, furnishings and workplace policies that enhance choice. Put simply, choice can be a way of giving something back to employees who are losing private offices.
- ▶ **Communicate your intentions.** Create a communication plan that includes the project goals and rationale, project logistics, and audience. An old adage from quality circles states that even the most technically successful program can be a spectacular failure if the communication component is ignored.



Consideration 1: Take a Holistic Approach

Take a holistic, organizational approach to your design project that incorporates broader business objectives (O'Neill, 2004). Ask the other internal service functions (human resources, information systems, etc.) of your organization to provide input and support to your project. For instance, if the stated goals for workspace change are driven by the need for increased teamwork and business performance, then build a transition that integrates changes to performance evaluation, incentive systems, new technologies, and work process, to ensure successful long-term change. There is a real opportunity to create a better solution if input from human resources, information systems and direct business leads is employed.

Consideration 2: Anticipate Conflicting Perspectives

The maxim that “perception is reality” seems to hold across a broad range of work issues. For example, the ease of visual supervision offered by low horizon, open office plans can be seen as an advantage by managers, but as an annoyance by their team members. In addition,

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while most managers report that noise is not a problem in their workplaces, an equal proportion of workers report that noise is a problem. The reality appears to reside in the individuals' perspectives, their previous

experiences, the roles they play in the organization, their work group affiliation, and, overall, by the unwritten social contract between employees and the organization.

For instance, does the office space devoted to executives differ significantly from that provided to managers or supervisors? How much space is allocated for clerical and other support staff? Where are these spaces located relative to the others? When shifting from a private office model to open plan, employees become sensitized to any real or perceived messages being sent, especially if the design is based on hierarchy and not functional requirements.

To experience the maximum potential benefits of moving to an open office solutions, think about how other people or business units will view the planned design change. If you move employees and their managers to an open office plan, while the leadership team remains exclusively in private offices, this could cause skepticism and mistrust throughout the organization. Base the change to work spaces on functional requirements, not simply job level, and improve shared amenities to give something back to employees who might perceive they have given up something in the change.



Consideration 3: Build-in Choice

The opportunity to manipulate task lighting, storage and display elements, seating, and technology tools increases employee perception of choice and has positive performance and health implications (O'Neill, 2007; 2010). Aspects of the work environment that decrease perception of control usually decrease worker satisfaction and can have negative performance implications (O'Neill, 1994).

In transitioning from traditional, private offices to more open configurations, invest in work tools, seating, and furnishing features that increase individual control within their primary workspace.

Increasing control can be a way of compensating employees for the perceived loss of status after losing a private office. Our experience suggests that the amount of choice provided by the workspace could become a status marker itself, like the door on a private office is for some office workers.

Change Readiness Assessment

Determine when the change readiness assessment will take place: at the beginning of the program to assess end-user requirements, at the end of the program to assess the effects of the program, or at both points.

Develop a short survey that includes, at a minimum, the following measurement:

- ▶ I am personally very comfortable with change.
- ▶ My work group is very comfortable with change.
- ▶ I feel I possess the skills and knowledge necessary to manage change successfully.

If there is to be a post change survey, include questions on the quality of the end-user experience with the change process.

Collect employee demographic information such as department, job type, and tenure with company. This allows you to understand differences in change readiness between groups and create a targeted, effective change communication effort.

Ask employees to rank their preferred communication methods (for instance: bulletin board, town hall meetings, intranet sites, etc.), to ensure you employ the right media for the information.

Once the architect has gone, choice and control can still be provided at the facility level. For group work, storage furnishings can double as boundaries for collaborative zones and act as sub architectural elements to demarcate “ownership” of space by larger departments or business units. Storage elements can be relocated or reconfigured with a minimum of effort by the facilities group, as compared to the time and expense of drywall or other permanent architectural solutions. Likewise, demountable walls can be used in the same manner to identify spaces, and provide enclosure and work zones that can be readily modified. Flexible boundaries might also be used to reinforce and support the social network within the workplace.

Consideration 4: Communicate Your Intentions



When employees transition from private to open workspaces they undergo a process of change that can negatively affect their perceptions of the new space and risk the success of the move. The most technically perfect program can be a failure in the eyes of the beholder if the “softer side” of how the project affects people’s pride and emotions and connection to the organization is not taken into account (Cummings and Worley, 2004). Our

experience shows that the management aspects of workspace change are at least as important as the physical restructuring itself (O’Neill, 2008b).

There are many reasons why change can be difficult for people. For one, as employees age they may want more predictability in their lives. Employees like to know that they will show up at work and see the same people, work at the same office space, and perform a familiar job. Workspace change can disrupt this predictability and cause distress among employees.

Some people adapt to change easily, while others become skeptical at the first sign of change. The challenge is to find a way to implement change

without creating a stressful environment. Even though you can’t entirely predict the impact of change on the work environment, there are a few things you can do to help prepare yourself and your employees for change: planning, listening, sharing, availability, and following up.

Planning

Employees like to know how a particular change to the space is going to affect them. Dropping hints or providing vague answers can cause unnecessary anxiety and make the change more difficult to accept. Thus, the first step in a change communication project is to create a communication plan. Determine the content of your communication about the project, who you need to communicate to within the organization,

how you will communicate and when the communication will occur – usually before, during and after a project. A plan will help you be more organized. Chances are the more organized you appear, the more they will trust not only you, but the change itself.

Listening

Facility managers and designers often get caught up in everyday activities that make it difficult to truly listen to their internal customers – the end users. It is true that you may not be able to make everybody happy (it is always too hot or too cold for someone), but it is worthwhile to listen to what your end-users have to say. They may bring a common problem to the surface. They may have ideas that lead to a better design solution.

A first step is to conduct a “change readiness” survey to assess employee expectations and informational requirements that can help you design your change communication program (see sidebar on previous page). Depending on when you collect this information, and the questions included, the survey could also be used to fine-tune the proposed design solution. In addition, a “soft” survey outcome is to implicitly communicate that you care about employee concerns.

What to Share with Employees

First and foremost **communicate the top-line elements of the business rationale** for the change. If cost reduction is a primary driver, then state it, but put cost in the broader context of other business decisions.

Make sure to **include all business drivers**. Knoll research shows that desire for increased collaboration, improved ergonomics, attraction and retention are also top reasons for change.

Once established, **share the overall timeline** for the change process and key milestones that have the potential to affect your end-users. With each milestone, note “what to expect” from the perspective of the end users.

Emphasize the benefits of the change, such as improved amenities, refresh of interior space, better lighting, more convenient access to space, etc. so that employees consistently get a balanced picture of the change.

If possible, **create a theme for the upcoming change that ties into the company branding** and message. This sets your project more firmly into the business context and direction of the organization and can increase acceptance of the change.

Sharing

Provide people with the information they need to understand the upcoming move or redesign, in an effective format (intranet website, bulletin board posting, email, etc.) (see sidebar, at left).

One thing people seem to forget is that communication goes both ways. Employees need to know that they have a voice, that their concerns and ideas are heard and valued. Thus, two-way communication techniques such as informal lunch and learns, town hall meetings, a post-move survey, or even conference calls are useful communication processes. Also, the more information they have, the more comfortable they will feel and will likely be more willing to accept the change to the workspace.

Availability

Even though you are likely running in a million different directions throughout the day, it is important that you make yourself and your team available to the end-users involved in the change, especially during a time of change (such as the week the move occurs). Knowing that you are available to address their concerns could make them feel more secure and confident about how the change will affect them.

Following Up

Following up with employees to check on how they are adjusting to the new workspace is a key element to implementing a successful change. How has the change impacted their job? Are any adjustments needed to make the work flow smoother? Have there been any unexpected outcomes as a result of the change? Use a follow up survey after the move to gather confidential information (see sidebar, previous page), but also set dates to follow up with employees for face to face discussion. Their feedback is important to ensuring a positive outcome.

Summary and Design Recommendations for Moving to an Open Plan

The results of our research and practical experience suggest that employee expectations and preferences related to workspace type are complex, are influenced by work role and demographics, and change. We discussed four considerations for a successful workspace transition: the importance of a holistic approach to problem solving; anticipating differences in how individuals and groups will perceive the solution; designing to support choice and control; and communicating and managing the change before, during, and after the project. In this section, we share some design recommendations on how to successfully combine the use of both open and enclosed workspaces.

Minimize Distractions in the Primary Workspace

A typical criticism from employees who transition to a more open workspace is an increase in perceived noise and related distractions (Crocker, 1997; O'Neill, 2008c). To counter these complaints, consider how

MINIMIZE

the choice of wall and floor covering materials in the space can be used to reduce the overall noise level. In problem areas, investigate the use of acoustic buffers (such as sound absorptive products that can be wall-mounted) or sound masking capability.

Determine workspace adjacencies, and how employees are assigned to specific workspaces, based on job complexity and the related need to control auditory distractions.

Balance Interaction with Need for Privacy

Job functions that require a large proportion of focus work, such as software developers, should not be placed adjacent to areas such as break rooms, hallways and other noisy areas. In open plan settings, design and orient workspaces to provide users with control over visual access by others.

This control can be provided by considering the overall amount of enclosure in terms of panel height, number of sides, internal layout and the visual permeability of the materials surrounding the workspace (O'Neill, 2008a).

BALANCE

Promote Information Sharing, Learning and Mentoring

For greatest effectiveness, organizations need to encourage and support spontaneous meetings in a more relaxed atmosphere (Heerwagen, Kampschroer, Powell, and Loftness, 2004).

Facilities with smaller workstations are most effective when complemented by casual spaces that promote informal and spontaneous interaction (O'Neill and Wymer, 2009). Employees who remain within enclosed

PROMOTE

offices after the change can be drawn out with spaces that act as "magnets" for informal collaboration, such as café areas, game rooms, tech labs, and libraries (Wymer, 2008). These spaces should have comfortable furnishings and should be located in areas adjacent to private workspaces.

The overall workspace should address the need of more experienced employees to continue to learn and develop, with the desire by less experienced employees to be mentored. One approach is to design the open office space with lowered horizons, while also providing a variety of small interaction spaces located evenly throughout the facility (Wymer, 2008). With wireless technology, employees can easily move to one of the enclosed spaces for casual exchange of information, small group meetings or simply to work without interruption.

Conclusions

We wrote this paper to address the ongoing trend of companies moving away from a high proportion of private offices, towards an approach that uses both open and traditional enclosed office spaces. We see this as a journey away from the primacy of the enclosed office – but we do not suggest a final destination. Rather, we offer this approach to managing change as a way of meeting today's needs, recognizing that change to the workspace is part of an ongoing evolution consisting of a series of smaller steps over time. ■

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