

WHAT ECONOMIC TECH SOCIAL



SO WHAT EFFECTS IMPACTS MANDATES

NOW WHAT ENGAGE ACTIVATE LEAD

DIRECT CRE IMPACTS

sensor + app

portfolio management equipment optimization crowd funding

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INDIRECT CRE IMPACTS

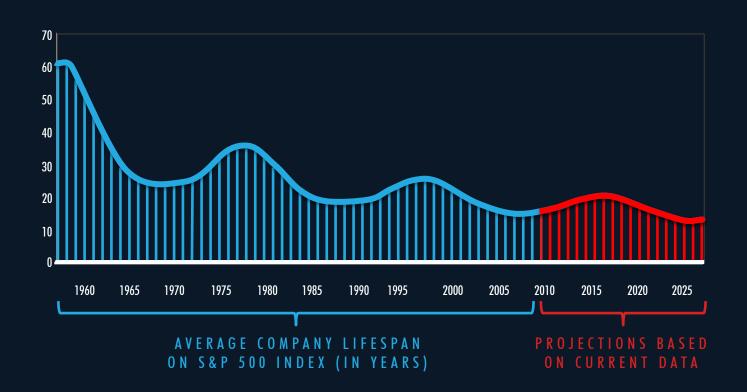
capability + pivot

globalization enterprise management functional tipping-points

...

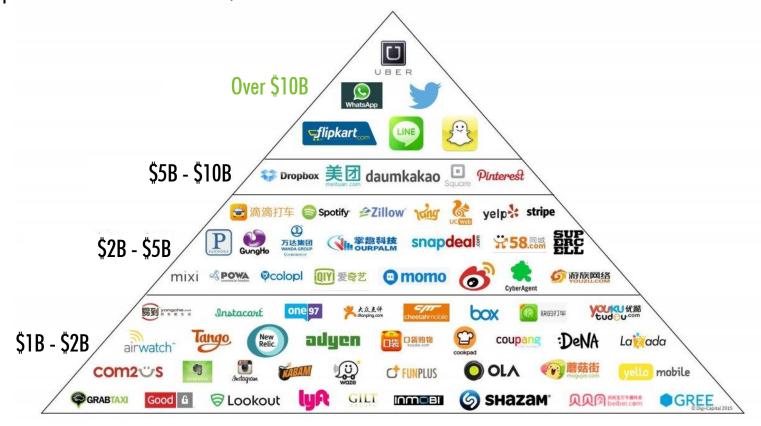
"Scratch a car company... and a tech company will bleed."

THE SCARIEST GRAPH IN BUSINESS

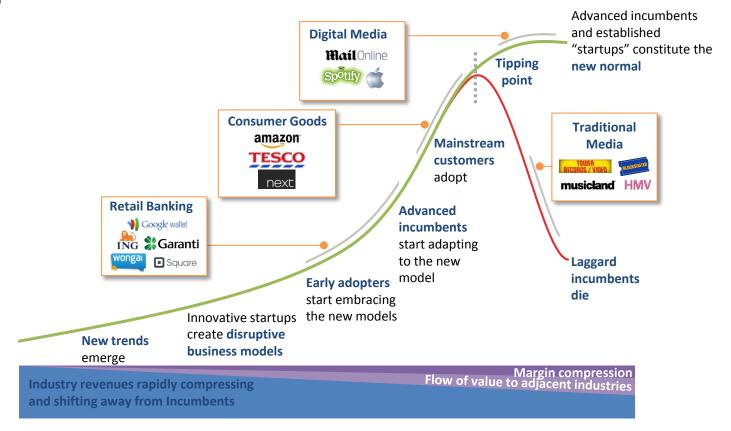


Unicorn Decacorn

SCALE | UNICORNS OUT, 'DECACORNS' IN



PATH | DISRUPTION ROADMAP



WHY | ENTERPRISE TRANSFORMATION

We are mid-shift in a fundamental refocusing of consumer behaviors.

- James Gilmore,
Authenticity: What Consumers
Really Want



100 Years of American Business

Agrarian:

Society remains largely designed to meet fundamental human needs

Industrial:

Rise of labor-based industry built to produce hard goods on a strict price basis

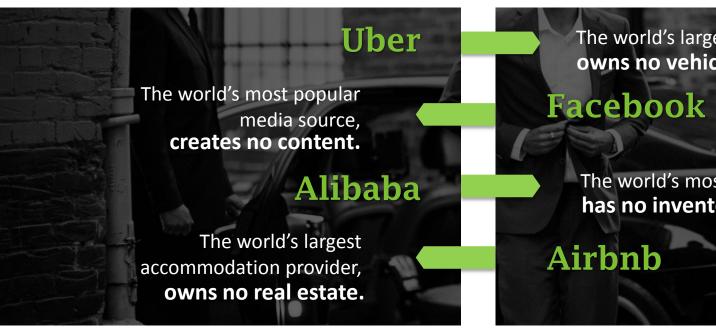
Service:

Introduction of specialized, knowledge-based, management-focused corporations

Experience:

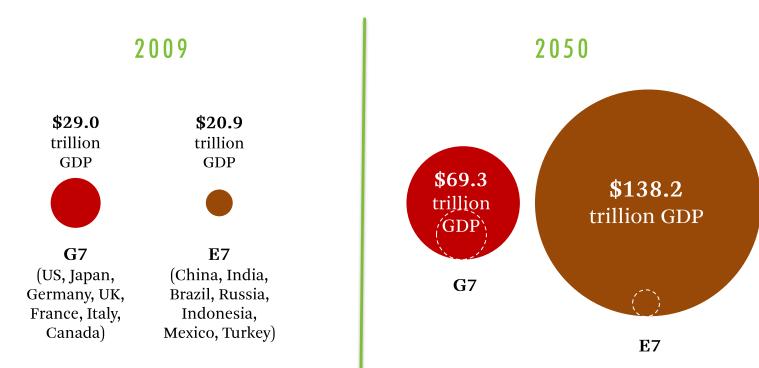
Consumers seeking integration within a branded lifestyle

DIFFERENCE | EVERYTHING ON DEMAND



The world's largest taxi company, owns no vehicles. The world's most valuable retailer, has no inventory.

REACH | GLOBAL + EMERGING MARKETS



BREADTH | INNOVATION-BASED M&A

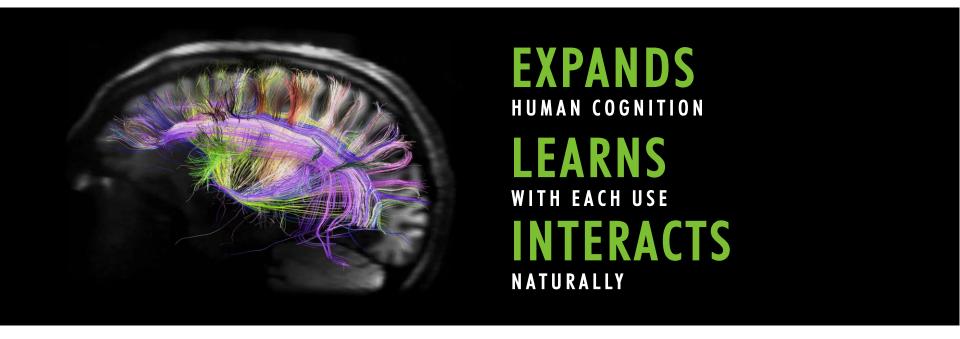
ON THE HORIZON FOR 1,600 EXECUTIVES



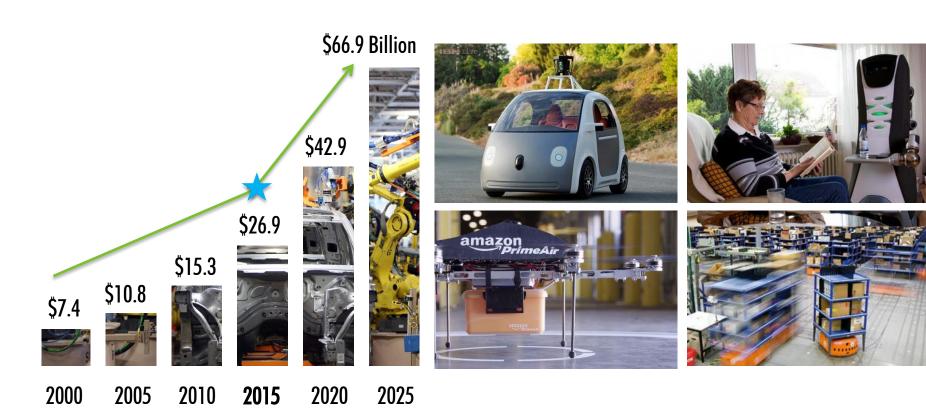
56% plan to pursue an acquisition within 12 months



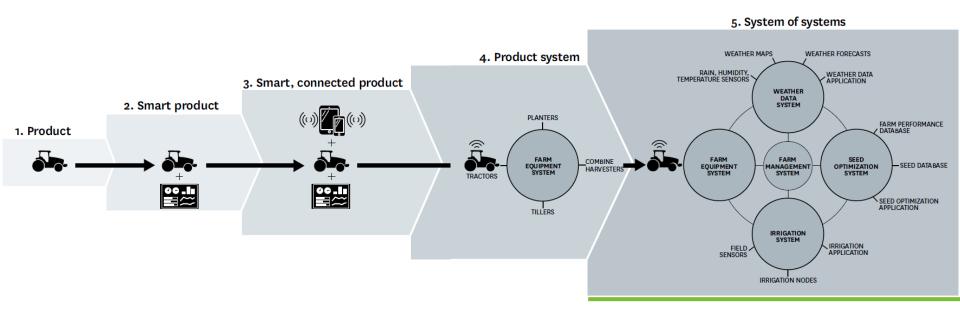
HOW | INTRODUCING COGNITIVE COMPUTING



ACCEPTANCE | CONSUMER ROBOTICS



NEW BOUNDARIES | INTERNET OF EVERYTHING

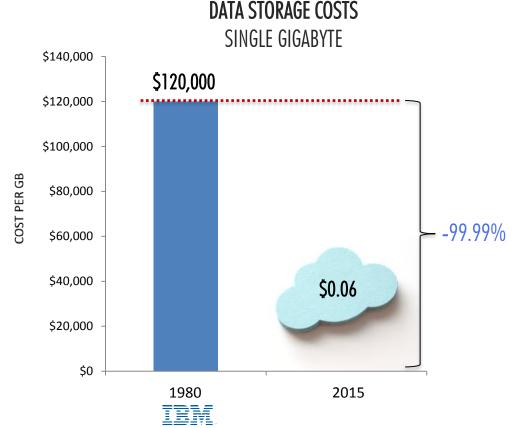


PLENTIFUL | DATA STORAGE

ON FUTURE OF THE CLOUD | Amazon, Google and Microsoft



- Aaron Levie, cofounder of Box



SHIFTING | TALENT BASED ECONOMY

1963 2013

72%

10%

MOBILE | THE MODERN FAMILY

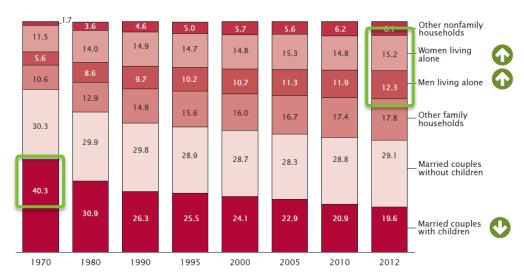
ON THE DISAPPEARANCE OF TRADITIONAL FAMILIES

There is a new and tremendous amount of liquidity in the US labor pool...much more flexible, mobile, and responsive.

- Edward Yardeni, Economist

Figure 1.

Households by Type, 1970 to 2012: CPS
(In percent)



Source: U.S. Census Bureau, Current Population Survey, Annual Social and Economic Supplement, selected years, 1970 to 2012.

CAUSE OR EFFECT | VALUE & VALUES CONCIOUS DIGITAL NATIVES

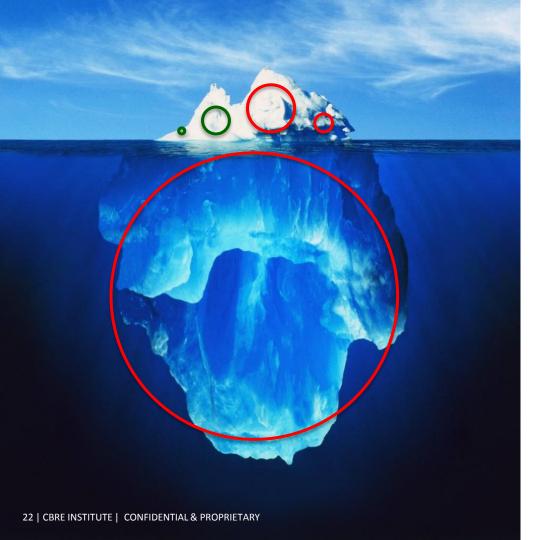


- Critical Mass is Growing
 More than one-third of the U.S. workforce is aged 18 to 34
- Motivated by a Carpe Diem Philosophy 64% would rather make \$40,000/year at a job they love than \$100,000/year at a job they think is boring
- Talent is Attracted to Creative Outlets
 The top five ideal employers are Google, Apple, Facebook,
 the U.S. State Department, and Disney
- Talent Shortages have Never Been Higher 65% of global companies are having problems finding employees with the skills they need



50% of space is underutilized (surplus)

70% of employees are disengaged (waste)



LIFETIME COSTS

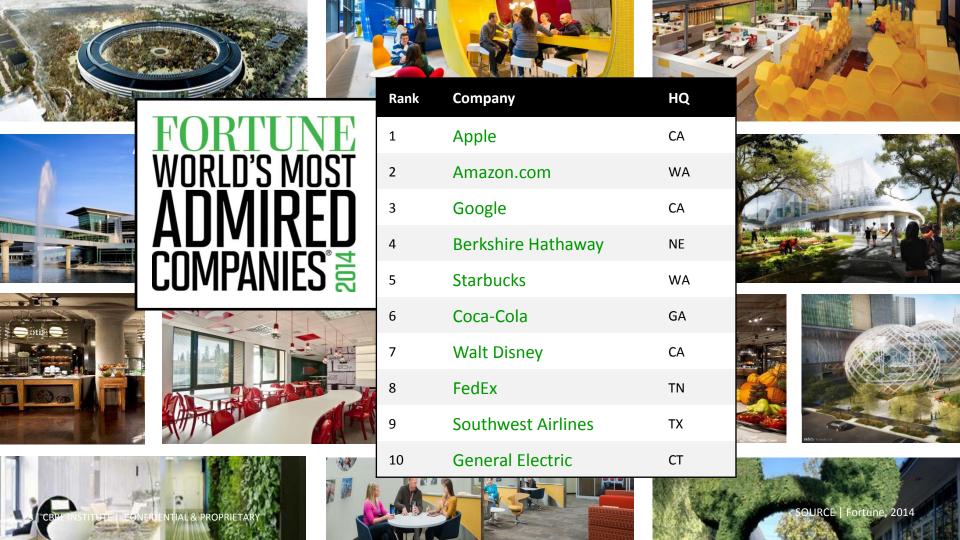
3% Operations & Maintenance

10% Technology

5% Facilities

0.5% Design

82% People





WILL TOP TALENT STAY FOR THE INTERVIEW?





THE IMPACT | CRE MUST EMBRACE A NEW ROLE

YESTERDAY TODAY TOMORROW

Workspace

Capacity & density

Workplace

Business strategy & productivity











THE ROAD AHEAD | TECHNOLOGY & THE CORPORATE OCCUPIER

Accept and integrate with 'radical mobility'

"I work" vs. "I go to work"

Define our participation in the collaboration economy

"I want to listen to music" vs. "I want to buy the CD"

Deliver creative, engaging workspaces

Inspiring and supporting a modern knowledge miner

Stop providing an office and start collaborating on a solution

"Moving CRE from a debit to a credit"

