
Workplace Experience Strategy Workbook

A practical guide for aligning space, culture, operations, and belonging.



Why Workplace Experience Matters

Imagine a team of four, spread across the globe, united in mission and working at full capacity to solve complex challenges for their organization. As a Workplace Experience leader, your role is to ensure that the team thrives no matter where they are.

The walkthrough is no longer enough. With distributed teams and hybrid work, workplace leaders need sharper tools to measure workplace health, listen across roles, and focus attention where the experience is strongest or weakest.

This workbook is interactive, practical, and designed to move you from awareness to action with tools, reflection prompts, and decision aids tailored for today's workplace challenges.

Use this as a working field guide: read, mark up, discuss, test, and return to the pages as your strategy gets sharper.

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01

Core Shifts in Workplace Strategy

Recognize how workplace strategy has changed and where your organization is already adapting.



SECTION OUTPUT

A ranked view of which workplace shifts are already underway and which require leadership attention.

SECTION 01

Core Shifts in Workplace Strategy

The workplace is no longer a fixed office model designed around centralized oversight. Work today is dynamic, distributed, and digital-first. The workplace must evolve to meet this new reality.

Recent workplace research points in the same direction: CBRE's 2026 Global Workplace & Occupancy Insights describes a continued move toward thriving hybrid workplaces, while Gensler's 2026 Global Workplace Survey shows that learning, connection, and new work behaviors are reshaping the value of the office.

At Sustainaprise, we use the following five shifts as a lens for diagnosing workplace readiness and opportunity.

1. From Static to Dynamic

Instead of designing once and enduring for a decade, we prototype, iterate, and adapt in response to changing needs. Agility is the new durability.

2. From Compliance to Belonging

Workplaces must move beyond checklists to experiences that support access, trust, participation, and everyday signals of respect.

3. From Control to Enablement

The future belongs to systems that build trust, offer autonomy, and empower people to perform at their best from anywhere.

4. From Uniform to Personal

Designs, services, and policies must respond to different work styles, life stages, and cultural identities, not erase them.

5. From Operational Overhead to Strategic Lever

Workplace experience is strategy. It drives retention, wellness, innovation, brand, and mission delivery.

PAUSE AND CAPTURE

Core Shifts in Workplace Strategy

Which of these shifts is already happening in your organization?

Which shift is most urgently needed?

Where are your biggest blind spots?

Are there any other unnamed shifts that you have observed?

Workplace Shift Readiness Scan

Rank your organization across the five shifts. For each one, name the evidence behind your rating and one next action.

| Shift | Current Rating (High / Medium / Low) | Evidence You See | Immediate Action |
|---|--------------------------------------|------------------|------------------|
| Static to Dynamic | | | |
| Compliance to Belonging | | | |
| Control to Enablement | | | |
| Uniform to Personal | | | |
| Operational Overhead to Strategic Lever | | | |

02

Setting a Working Vision for Your Workplace

Draft a practical vision for what the workplace should reflect, support, and reinforce.



SECTION OUTPUT

A first-draft workplace vision statement and a short list of values/culture signals to test in the next two sections.

SECTION 02

Setting a Working Vision for Your Workplace

Great Workplace Experiences do not happen by accident. Sustained positive work experience requires intention, focus, and clarity. That is why it helps to begin with a working vision for your workplace.

Treat this vision as a draft, not a final declaration. You are naming what you believe the workplace should support, then testing that belief against the organization's strategy and people's real experience.

Values are what an organization claims to prioritize. Culture is how those values show up, or do not show up, in day-to-day interactions. The work of this section is to name what the workplace should reflect, support, and reinforce.

Be the mayor. Walk the floor, listen across levels, and talk to people one-on-one. Your job at this stage is not to sell a vision; it is to understand how the workplace is actually experienced.

Take meticulous notes after listening sessions and one-on-ones. Debrief immediately while the details are still fresh. AI notes can help, but trust and candor matter, so use the method that keeps people comfortable and honest.

PAUSE AND CAPTURE

Setting a Working Vision for Your Workplace

Which documents define or articulate the organization's values?

Are those documents dated?

Do staff know they exist?

What works well in the workplace?

What does not work well?

What is your ideal workplace?

Working Vision Capture

Use the space below to draft a first workplace vision and name the values or culture signals that should be tested next.

| Draft Workplace Vision Template | Values / Culture Signals to Test |
|--|----------------------------------|
| Our workplace exists to support _____ so that _____. We create conditions where _____ while reinforcing _____. | |
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03

Understanding the Organizational Context

Connect workplace strategy to the organization's goals, direction, and operating reality.



SECTION OUTPUT

A strategic alignment grid connecting organizational goals to workplace strategy responses and priorities.

SECTION 03

Understanding the Organizational Context

With a working vision in hand, the next step is to look outward and understand the broader strategic direction your workplace supports.

Strategic plans communicate the organization's goals, focus areas, and future trajectory. These priorities influence what kind of workplace experience is needed to advance the mission.

Workplace vision is rooted in alignment. The key question is: What are you trying to achieve as an organization, and how can the environment reinforce that effort?

Strategic context gives your working vision direction. The next question is whether that direction reflects the real people, roles, and work patterns the workplace needs to support.

PAUSE AND CAPTURE

Understanding the Organizational Context

List three specific goals from your organization's strategic plan.

What kind of workplace experience helps bring each priority to life?

How could your workplace strategy respond to support each goal?

What space, service, or policy decisions might reinforce or contradict them?

Which strategies should be prioritized first?

Strategic Alignment Grid

Use one row per organizational priority. Be specific: a goal like 'expand regional programs' should lead to different workplace choices than a goal like 'increase cross-functional innovation.'

| Strategic Goal | Workplace Strategy Response | Priority (High / Medium / Low) |
|--------------------------------|--|--------------------------------|
| Example: Expand regional teams | Set clearer hybrid meeting standards, improve shared digital tools, and create consistent team rituals across locations. | High |
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04

Understanding Your Workplace Personas

Put people at the center of workplace strategy by naming key patterns of need, work style, and support.



SECTION OUTPUT

A persona map that identifies key workplace user groups, their needs, barriers, and success conditions.

SECTION 04

Understanding Your Workplace Personas

You now have a working vision and a clearer view of the organization's strategic direction. But spaces do not matter unless they work for the people who use them.

Personas are not job titles. They are composites of how people work, what they need to thrive, and what challenges they face.

Understanding them helps you prioritize design decisions, space types, service offerings, and policies with more precision.

SECTION 04

Workplace Personas

Personas are design lenses, not boxes. They help you recognize patterns of need without flattening the people behind them.



Cross-Team Collaborator

Project rooms, shared tools, informal connection points.



Focus-First Contributor

Quiet zones, library norms, and protected time.



Embedded Leader

Flexible one-on-ones, coaching, and culture modeling.



Field-Based Operator

Reliable digital infrastructure and a clear home base.



Culture Carrier

Space and permission to make connection visible.

PAUSE AND CAPTURE

Understanding Your Workplace Personas

Which personas do you see reflected in your organization?

Which personas are missing?

Who might be underserved by your current workplace setup?

How does each persona's experience align or clash with your Workplace Experience vision?

Persona Mapping Template

Capture and analyze personas in your organization. Consider involving team leads or conducting short interviews to gather insight.

| Persona Name | Core Needs | Frustrations / Barriers | What Success Looks Like |
|----------------------------------|---|--|--|
| Example: Cross-Team Collaborator | Project space, shared tools, reliable hybrid support, informal connection points. | Hard to find space; inconsistent tech; collaboration depends on workarounds. | Teams can work across locations without losing momentum or connection. |
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05

Reevaluating Your Workplace Vision

Return to the draft vision and make it sharper, more grounded, and more useful.



SECTION OUTPUT

A revised set of workplace vision pillars that can guide decisions across design, operations, services, policies, and team behavior.

SECTION 05

Reevaluating Your Workplace Vision

By now, you have a working vision, a clearer read on organizational direction, and a more human view of the people the workplace needs to support.

A strong vision is not a slogan you defend at all costs. It is a practical tool that gets sharper as better information comes in.

Your workplace experience vision framework can become a set of guiding principles that reflect your values, respond to your strategic direction, and account for the people and personas your workplace needs to support.

Examples include mission alignment, belonging and access, environmental stewardship, performance and adaptability, and experience and connection. Use these as starting points, not required language.

PAUSE AND CAPTURE

Reevaluating Your Workplace Vision

What part of your initial vision still feels right?

What needs to change based on the organization's strategic priorities?

Whose experience was missing or underrepresented in the first draft?

Where do values, culture, strategy, and people needs reinforce each other?

Where do they conflict?

Vision Recheck

Use your findings from organizational context and persona mapping to revise your workplace vision. Keep what still holds up. Adjust what feels too generic, too aspirational, or disconnected from how work actually happens.

| Initial Vision / Pillar | What We Learned | What Needs to Change | Revised Vision / Pillar |
|---|---|---|--|
| Example: "Create a collaborative workplace" | People need collaboration, but also protected focus time and better hybrid tools. | Make the pillar more specific and balanced. | Support purposeful collaboration without sacrificing focus, inclusion, or flexibility. |
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06

Experience Design Priorities

Translate strategy into the experiences your workplace should enable every day.



SECTION OUTPUT

Three to five experience priorities that can serve as decision criteria for workplace design, services, and operations.

SECTION 06

Experience Design Priorities

At this stage, you have drafted a working vision, tested it against organizational context, and explored the personas that represent your people.

Now it is time to shift from insight to intent. Experience design priorities shape how decisions are made across space, services, and operations.

A strong experience priority should help you make a decision. If it cannot guide a tradeoff between two options, it may still be too vague.

EXAMPLES

| Example Design Priority | Description |
|----------------------------------|--|
| Enable Deep Work | Support focused, uninterrupted work. |
| Foster Collegiality | Encourage informal connection and peer support. |
| Inspire Purpose | Make mission, values, and impact visible. |
| Support Cross-Team Collaboration | Enable work across teams, locations, and functions. |
| Champion What Matters Most | Reinforce the organization's most important commitments. |
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PAUSE AND CAPTURE

Experience Design Priorities

Which experience design priorities feel essential for your organization?

Which ones feel incomplete or off-target?

What other priorities are emerging from your earlier insights?

What are your design priorities?

Experience Design Criteria Builder

Define three to five priorities that can guide decisions across space, services, policies, and operations.

| Design Priority | Current Support (Space / Tools / Norms) | Quality (Low / Medium / High) | Gaps / Needed Improvements |
|-----------------|---|-------------------------------|---|
| Focus (example) | Quiet rooms exist, but norms around interruption are unclear. | Medium | Clarify quiet-zone expectations, add signage, and protect focus blocks. |
| Priority 1 | | | |
| Priority 2 | | | |
| Priority 3 | | | |
| Priority 4 | | | |
| Priority 5 | | | |

07

Design, Services, and Operational Considerations

Evaluate the systems people actually touch: space, service, technology, arrival, maintenance, and everyday support.



SECTION OUTPUT

A short list of operational friction points that either reinforce or undermine your workplace vision.

SECTION 07

Design, Services, and Operational Considerations

Every Workplace Experience strategy eventually has to leave the page and come to life. That means translating ideas into actions and intentions into physical spaces and operating systems.

Design and logistics are where strategy becomes visible and felt. The way someone enters the office, finds a meeting space, settles into focused work, or uses available tools will either reinforce your culture and goals or quietly undermine them.

Look across space, services, technology, maintenance, hospitality, and everyday operations. Many workplace problems emerge when the operating model does not support the experience the organization says it wants.

| Example Operational Consideration | Notes |
|-----------------------------------|---|
| Wayfinding and Signage | Can everyone easily navigate the space? |
| Access and Arrival | What story does the entry sequence tell? |
| Focus Areas | Do quiet zones exist and are they respected? |
| Meeting Spaces | Are rooms aligned with how people collaborate? |
| Technology Integration | Is hybrid work frictionless or frustrating? |
| Service Model | How do people get help and resolve everyday friction? |

PAUSE AND CAPTURE

Design, Services, and Operational Considerations

What features of your current space delight people?

What frustrates or confuses them?

What is so embedded in the background that it is invisible but essential?

What did staff notice when walking the space through a persona or priority lens?

Design and Operations Audit Map

Choose one experience design priority or persona. Walk the space with that lens in mind. Where is alignment strong? Where does it fall short?

| Area or System | Aligned with Strategy? (Y / N / Partial) | Notes or Observations |
|---------------------------------|--|---|
| Example: Hybrid Meeting Support | Partial | Rooms exist, but remote participants often have uneven audio, camera, or facilitation experience. |
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08

Supporting Design Priorities (Section 6) with Spatial Strategies

Move beyond rooms and layouts to understand the priorities of work your environment must support.



SECTION OUTPUT

A clear picture of which design priorities are well supported, which are missing, and which require cultural or operational support beyond physical space.

SECTION 08

Supporting Design Priorities (Section 6) with Spatial Strategies

Beyond layout and amenities, great workplaces anticipate the rhythms of real work: heads-down concentration, lively brainstorming, spontaneous connection, and moments of recharge.

Do not evaluate design priorities by space alone. A quiet room does not support focus if people feel guilty using it. A collaboration space does not support collaboration if the technology fails remote participants.

You do not need a room for every function. You need intentional zones, clear signals, and a culture that respects the purpose of different settings.

EXAMPLES

1. Focus

For uninterrupted, deep work. Requires quiet, privacy, and low stimulation.

2. Collaboration

For real-time exchange, problem solving, and team creation. Needs visibility, tools, and proximity.

3. Social Connection

For informal interaction, bonding, and culture-building. Thrives in relaxed, inclusive spaces.

4. Restoration

For pause, mindfulness, and reset. Benefits from calm design, natural elements, and separation from task zones.

PAUSE AND CAPTURE

Supporting Design Priorities (Section 6) with Spatial Strategies

Which design priorities are currently well supported in your workplace?

Which design priorities are missing or underdeveloped?

What do teams ask for most often?

Think back to Section 6: Design Priorities. How are you supporting those priorities through space, tools, norms, and access?

Design Priorities to Space Mapping

Use the table below to evaluate your workplace readiness and identify gaps or mismatches across space, tools, norms, and access.

| Design Priority | Current Support (Space / Tools / Norms) | Quality (Low / Medium / High) | Gaps / Needed Improvements |
|-----------------|---|-------------------------------|---|
| Focus (example) | Quiet rooms exist, but norms around interruption are unclear. | Medium | Clarify quiet-zone expectations, add signage, and protect focus blocks. |
| Priority 1 | | | |
| Priority 2 | | | |
| Priority 3 | | | |
| Priority 4 | | | |
| Priority 5 | | | |

09

Measuring Success

Build a focused measurement plan that helps the workplace strategy learn, adjust, and earn investment.



SECTION OUTPUT

A focused measurement plan with 3 to 5 metrics, clear ownership, and a review rhythm.

SECTION 09

Measuring Success

You cannot improve what you do not measure. In Workplace Experience, measurement is about more than counting people or logging badge swipes. It is also about knowing whether the systems you have put in place are working for your people, your mission, and your space.

With the right metrics in place, you can identify what is gaining traction, course correct early, and make the case for further investment.

Metrics are not just for leadership reports. They are tools for learning. Make it a habit to revisit workplace metrics at least once a quarter.

You do not need to measure everything. Trying to track every metric often creates noise instead of clarity. Focus on the indicators that matter most to your organization.

1. Utilization

Are the spaces being used as intended? Are there patterns of underuse or congestion?

2. Satisfaction

Do staff enjoy the experience: spaces, tools, services, and interactions?

3. Alignment with Mission

Are your workplaces helping teams advance the organization's goals?

4. Inclusion and Belonging

Are different identities, roles, and abilities being served with care and consistency?

5. Environmental Impact

Are you improving energy use, material sourcing, and waste reduction?

6. Adaptability

Can your workplace systems flex in response to new needs?

PAUSE AND CAPTURE

Measuring Success

What do you currently track about your workplace, and what is missing?

Do your metrics reflect your vision and strategy, or are you stuck measuring what is easy?

Which three to five indicators would help leadership make better workplace decisions?

Define the Maturity Scale

Use this scale to rate each metric in the scorecard on the next page. The point is not to create a perfect score; it is to create a shared language for progress.

| Score | Maturity Level | What It Means |
|-------|----------------------------------|--|
| 1 | Not Measured | We do not currently track this in a consistent way. |
| 2 | Tracked Informally | We have anecdotes or occasional data, but no reliable rhythm. |
| 3 | Tracked Regularly | We collect data on a recurring basis and can see patterns. |
| 4 | Reviewed and Acted On | We discuss results and make adjustments based on what we learn. |
| 5 | Tied to Decisions and Investment | The metric informs priorities, funding, pilots, or leadership decisions. |

Workplace Scorecard Builder

Use this scorecard tool to define your success framework and assign clear ownership. Select 3 to 5 metrics that best reflect your workplace goals.

| Metric | What You Are Tracking | Data Source | Owner | Frequency | Score |
|--------|--|------------------------|---------|-----------|-------|
| Focus | Rating of space, time, and norms for focused work. | Quarterly pulse survey | WX Lead | Quarterly | |
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10

Prototyping and Planning for the Future

Turn measurement and insight into small, visible tests that teach the organization what to do next.



SECTION OUTPUT

A prioritized prototype plan that connects directly to your metrics, vision pillars, and experience priorities.

SECTION 10

Prototyping and Planning for the Future

With a measurement plan in place, you can test ideas with more discipline. Great workplaces are living systems that respond to real people, real needs, and real-time learning.

You do not need to overhaul everything at once. Workplace strategy evolves through prototypes: small-scale, intentional tests that inform future investment.

A good prototype should test a specific assumption, address a known friction point, and teach you something you can use.

In my experience, complete overhauls rarely deliver the return people expect. Start small and iterate. Build a culture of continuous improvement, focus on the details, and keep the momentum going.

1. Spatial

Try converting one room into a new concept, such as a library zone or retreat space.

2. Service

Pilot a new front desk model, tech concierge, or hospitality moment.

3. Policy

Test anchor days, no-meeting zones, or team-specific agreements.

4. Programmatic

Offer new rituals like all-staff events, guided desk tours, onboarding sessions, or guest speaker series.

PAUSE AND CAPTURE

Prototyping and Planning for the Future

Identify two aspects of your workplace, physical or operational, that feel disconnected from your strategy.

Which ideas are visible, low-risk, measurable, and tied to a real friction point?

What feedback loop will tell you whether the prototype is working?

Prototype Planner

Before choosing a prototype, use four filters: Is it visible? Is it low-risk? Is it measurable? Is it tied to a real friction point or experience priority?

| Prototype Idea | Type | Goal | Duration | Success Criteria |
|------------------|-------|------------------------|----------|--|
| Focus zone pilot | Space | Test quiet-zone norms. | 2 weeks | Focus score improves; fewer interruptions. |
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Closing Note

This workbook is a starting point. You now have a foundation to build a Workplace Experience strategy that is grounded in purpose and designed for impact.

As you reflect, prototype, and iterate, you will move closer to a workplace that feels intentional, empowering, and human.

You do not have to figure it all out alone. Use this workbook as a guide, and if you ever want a thought partner, Sustainaprise is here.

NEXT STEP



Ready for the Next Step?

Book a complimentary 30-minute Workplace Experience Strategy Discussion.

ABOUT

About Anthony Guerrero

Anthony Guerrero is a globally recognized leader in Real Estate, Workplace Experience, and Sustainability Strategy, with more than two decades of experience driving transformation across nonprofit, legal, real estate, and media sectors.

He has led the creation of award-winning, mission-aligned workplaces that advance culture, performance, and environmental goals. As an educator at Columbia University, Anthony teaches emerging and established leaders how to measure and reduce greenhouse gas emissions in the built environment.

He is the founder of Sustainaprise, a practice dedicated to transforming how we build, use, and share space.

About Sustainaprise

Sustainaprise helps organizations make space more intentional, sustainable, inclusive, and effective. Through Workplace Experience strategy, real estate advisory, hybrid work planning, and sustainable operations, we help leaders connect the built environment to mission, culture, performance, and belonging.

In parallel, Sustainaprise provides consulting, board advisory, and outsourced Workplace Experience teams for mission-driven organizations and forward-looking companies.

Let's Connect

Whether you are rethinking your workplace, piloting a new model, or exploring how to make space more intentional, Sustainaprise would love to hear from you.

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