



Capital Group

California & Texas, USA

WORKPLACE STRATEGY AND CHANGE MANAGEMENT

Capital Group launched its new workplace strategy across its campuses in Irvine, California and San Antonio, Texas to establish a more evidence-based approach to evolving the workplace. The project started with research and experimentation to learn from real employee behaviour, test assumptions and reduce risk before making large investments in office changes.

Both campuses are long-established workplaces – approximately 18 years old in Irvine and 27 years old in San Antonio. As a result, the strategy needed to consider existing infrastructure constraints, furniture lifecycles and established ways of working.

At the same time, Capital Group was navigating a shift in its return to office policy, making it even more important that the workplace decisions reflected how people actually work, rather than theoretical models. A key driver for developing the workplace strategy centred on ‘earning the commute’ and bringing the choice of workspaces people experienced at home into the workplace.





Capital Group's culture is rooted in a long term mindset, collaboration, and a deep commitment to doing what's right for clients and one another. Guided by its Core Values – Long Term, Diverse Perspectives, Integrity, Client Focus, and Community – Capital emphasises thoughtful decision making, respect for different viewpoints, and a strong sense of belonging. Together, these values shape how the company's associates work, collaborate, and deliver long term value for clients.

WORKPLACE STRATEGY

The workplace strategy was created through a pilot programme which combined quantitative workplace data, qualitative engagement data, and a live furniture configuration to create a continuous feedback loop between insight, testing, implementation and refinement. The outcome was a repeatable process that enables data driven workplace decisions in the future.

The strategy focused in three key areas:

- How employees work across different roles and teams
- How existing space and furniture supports or constrains employee behaviour
- How alternative workplace setups can better support employees

To test this, Capital Group used a controlled pilot environment which allowed the team to experiment with minimal capital investment. Kathy Dempsey, a senior manager leading the

workplace experience and pilot in Irvine, commented that 'the pilot let us test theories in a controlled environment rather than committing to a design based on assumptions'.

Another important goal was to create a transparent governance and engagement process so that employees understood that their feedback was both meaningful and material to the effort. A guiding principle of this approach was 'Learn and Scale' – using research and testing to inform decisions rather than relying solely on third party consultation, industry trends or benchmarks.

CHANGE MANAGEMENT

To guide the process, Capital Group created a cross-functional steering committee with representatives from across the business. The group supported the research and pilot efforts.

Change management was built into the project from the beginning. Rather than introducing workplace changes at the end of the decision-making process, employees were involved throughout. This included early communications about the goals of the project, opportunities to test new workplace settings, regular updates for leadership, and a network of 'change champions' who helped build trust with employees and guide others through the process.

Leadership interviews also helped ensure the workplace strategy aligned with the company's broader business goals.



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THE PROCESS

Research and discovery

The workplace strategy used a mixed-methods research approach across both campuses.

Qualitative research included:

- 12 months of badge and occupancy data
- Analysis of how different space types were used
- Workplace seating and meeting room distribution analysis

Qualitative insights were gathered through:

- Interviews with 24 senior business leaders
- 48 focus groups involving more than 400 employees

This approach ensured the strategy reflected the experiences of people working in different roles and teams across the organisation.

PILOT LOGISTICS

Instead of moving straight from research into creating design standards, Capital Group implemented live furniture pilots that ran from February to July 2025. The pilot was designed to test alternative workstation and collaboration configurations, observe real behaviour and gather feedback from employees using the space. The aim was to enable employees to choose work environments aligned to their tasks rather than relying on a single desk type.

This approach moved associates and senior managers into activity-based settings, replacing the current configuration of 1:1 associate workstations and senior manager offices.

Approximately, 10% of employees at each campus participated in the pilot. In total, 14 departments across the organisations took part in the pilot, and teams rotated through the pilot space in two-week cycles.

Before entering the pilot, participants received a virtual orientation explaining how the space worked and what the pilot aimed to learn. The approach allowed the organisation to observe how people adapted to new environments over time and compare feedback across departments.

PILOT IMPLEMENTATION

The pilot environments were designed to test a range of individual and collaborative space typologies. Spaces included: enclosed spaces for confidential and focused work; informal and formal collaboration areas to support in-person and hybrid interaction; and shared support elements including lockers and centralised resources.

By offering a range of settings, the pilot allowed employees to choose spaces that matched their tasks. This helped the project team understand how people moved between different types of work throughout the day.

FEEDBACK AND LEARNING

Feedback was directly embedded into the pilot process. Participants completed pre-pilot surveys to capture baseline awareness and sentiment, followed by daily micro-surveys which were provided through on the spot remarks and QR codes. These micro-surveys occurred in real time to identify and address furniture usability, technology performance and overall experience.

This cadence enabled actionable insights to be implemented immediately and across sites. These short-term refinements helped distinguish between initial adjustment challenges and long-term needs – enabling a continuous learning loop between research, testing, and strategy.

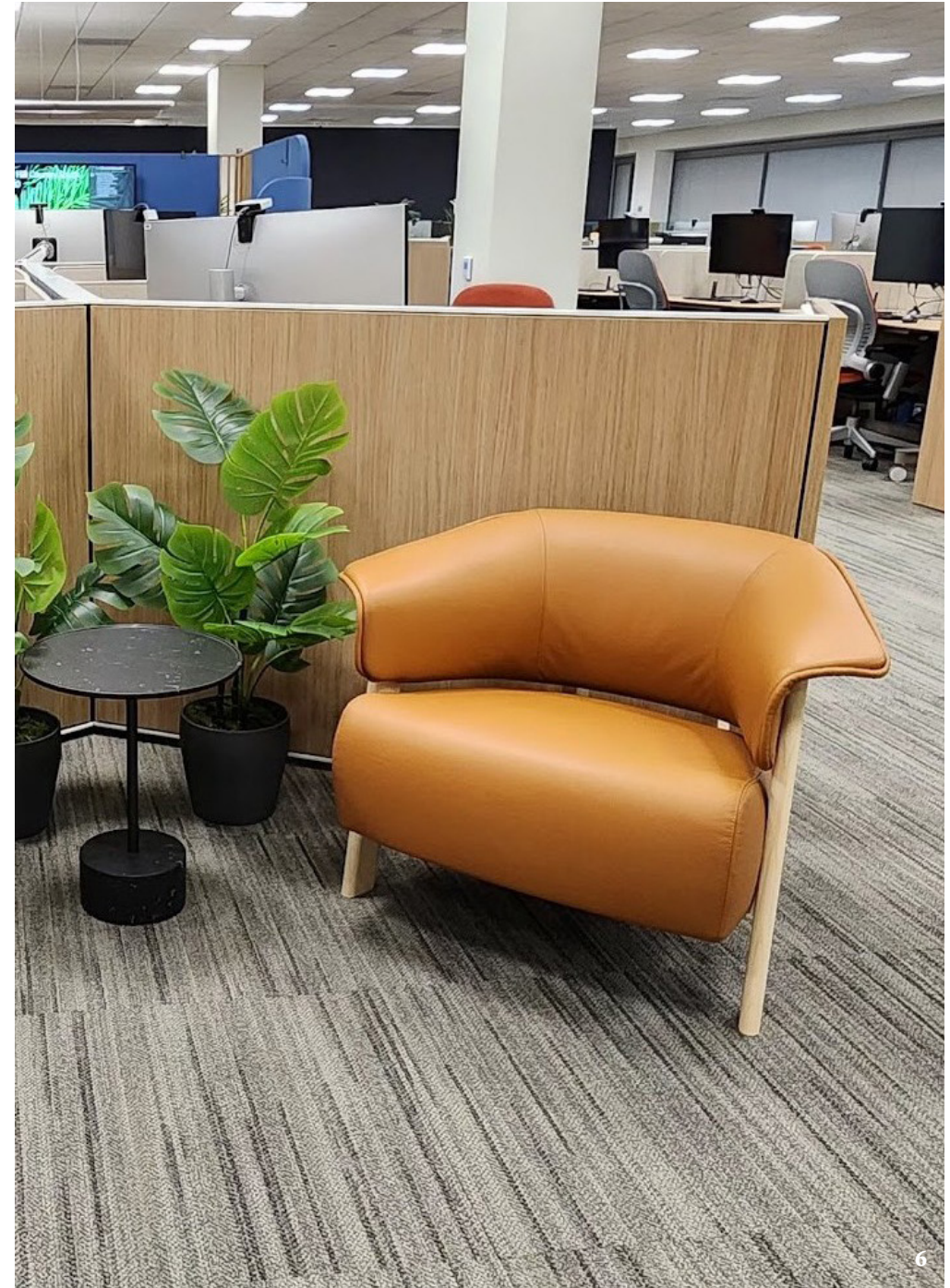
Observations from the study found that proximity to managers and colleagues created more opportunities for learning and alignment. Sarah Edwards, Workplace Experience

Senior Manager in San Antonio, commented that ‘when teams were co-located in the pilot space, we saw more spontaneous interaction and fewer formal meetings being scheduled.’

‘KIT OF PARTS’ AS STRATEGY

Insights from the research and pilot were translated into a ‘Kit of Parts’ framework that defined individual, collaborative, support and amenity space types. Instead of prescribing one, fixed solution, the project team developed a framework to function as a decision tool – helping teams evaluate different workplace options while maintaining consistency.

The framework also supports flexibility, allowing spaces to be reconfigured in the future. As Megan Clarke, Workplace Experience Occupancy Planner in Irvine stated: ‘We are designing spaces that support people doing their jobs well today while remaining flexible for future generations of workers.’



KEY TAKEAWAYS

Test before scaling or standardising

Running a live pilot allows organisations to validate ideas and refine solutions before rolling them out widely – mitigating the risk of premature investment.

Combine data with employee insight

Using both quantitative data and qualitative feedback ensures workplace decisions reflect real behaviours and employee experience.

Use pilots to reduce risk

Pilots provide a controlled environment for experimentation. Rotational participation across departments allows for broad exposure, minimises operational disruption, and facilitates iterative learning based on real-time feedback.

Engage employees early

Involving people across the organisation builds transparency, trust and shared ownership. Inclusive governance structures and representative feedback loops help surface diverse needs and align strategic direction with organisational culture.

Treat change management as part of design

Communication, leadership alignment and peer engagement should be integrated throughout the strategy process.

Design for flexibility and scalability

A modular framework allows the workplace to evolve as organisational needs change, rather than deploying fixed solutions.



Photographs

1. Informal collaboration area with soft seating (Irvine)
2. Ad hoc meeting space featuring a standing-height table and content-sharing capability (Irvine)
3. Workstation with enhanced privacy through higher wall panels (San Antonio)
4. Enclosed flex office to support virtual and in-person confidential meetings and focused work (Irvine)
5. Open-plan workstation with a standard single-monitor technology setup (Irvine)
6. Soft seating to support casual conversations (San Antonio)
7. Open-plan workstations designed for individual work (Irvine)
8. Open-plan workstations that support and encourage team collaboration (San Antonio)

Photography courtesy of Capital Group

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