

ICG Tech MSST

Change Management Kick-Off

Tampa, FL

May 2017

Gensler



Contents

- 01** Future of the Tampa Campus
- 02** Citi Works Strategy
- 03** What it Means for Me
- 04** Utilization and Occupancy

01

Future of the Tampa Campus

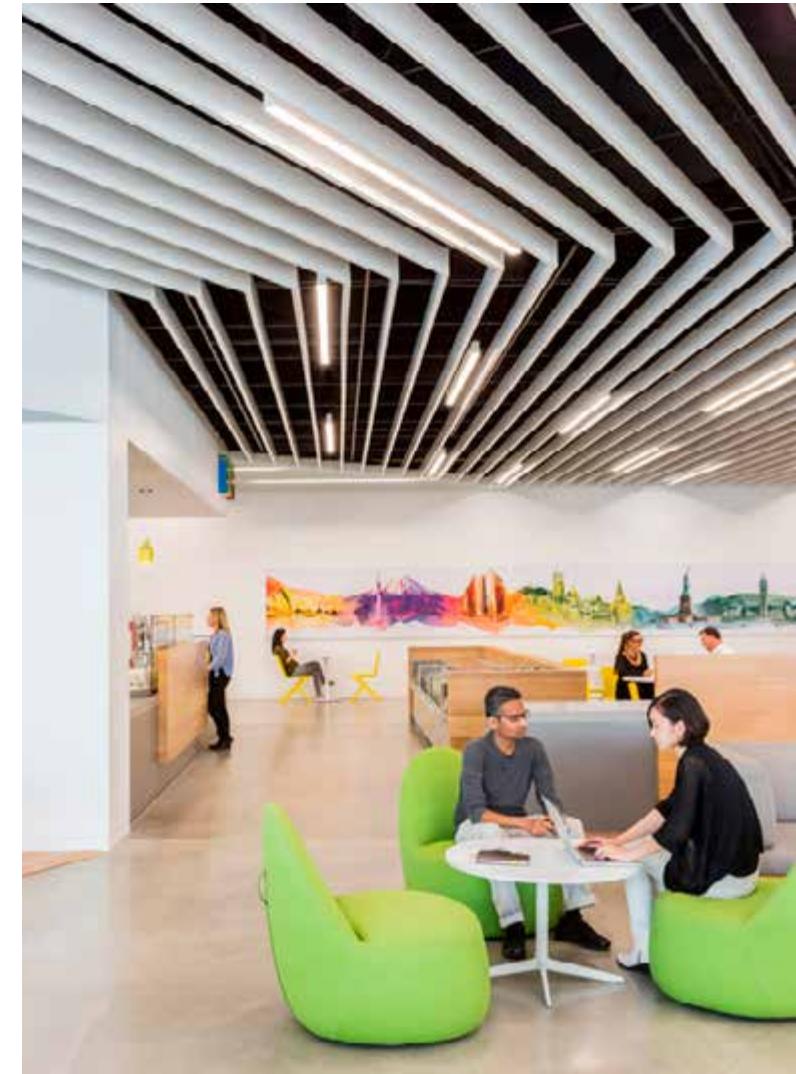
The vision for Tampa is to create a diverse work environment that strengthens the **culture** of our company.

Creating active and inviting spaces, both indoors and outdoors, will **engage** our colleagues and inspire our peers to do their **best work**.

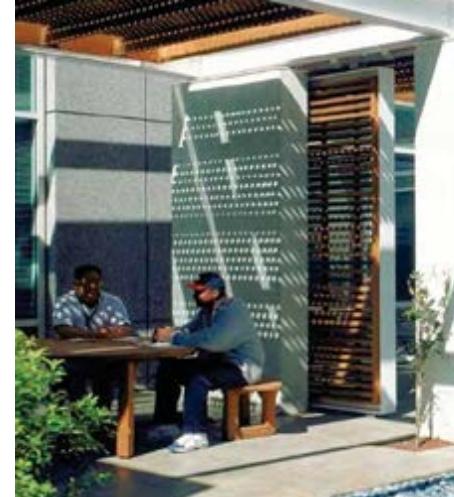
Tampa Today



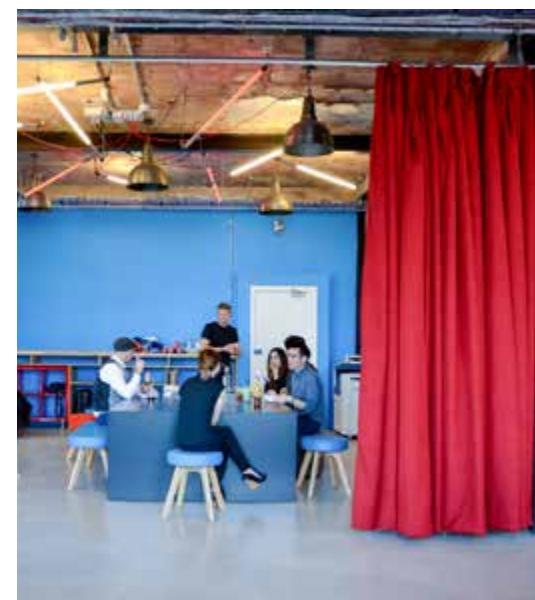
Look forward to spaces that build culture...



...that activate our colleagues



...that engage them in our business



...and that improve our work.



Tampa, FL
Building B Change Management

Mike Corbat

CEO



02

Citi Works Strategy



Citi Works is a new
workplace concept
designed to significantly
improve the way
our teams work and
collaborate.

Industry Trends Drive Design

Culture & Collaboration



Real Estate



Choice



Technology &
Mobility

Design Drivers

Efficient Work
Stations



Sustainability &
Wellness

Citi Works

Who?

All Citi employees globally

What?

Activity-Based Work design with leveraged and unassigned seating

Why?

Increase employee satisfaction and reduce real estate costs

How?

Alternative work settings enabled by technology and enhanced service

Citi Works Strategy



1 Activity-Based Workplace

Work settings to support a range of activities including focus and collaboration

2 Technology Alignment

Consistent technology that facilitates the unassigned seating model and collaboration enabled with audio/video conferencing

3 Unassigned Seating

Alignment of overall footprint, space allocation in proportion to actual utilization of space

4 Enhanced Service

Elevated level of space maintenance and employee support

Citi Works Long Island City

Gensler

15

Traditional Space



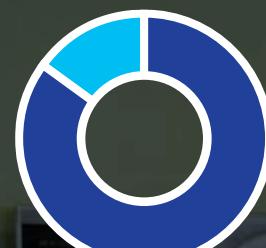
Citi Works



Physical Shift

Citi Traditional

Primary Space
Support Space
Open Choice
Enclosed Choice



Citi Works



Greater Variety

Owned Space
Shared Space



More Shared Space

Open Space
Enclosed Space



Consistent proportions of open vs enclosed spaces

Citi Works Long Island City

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Leveraging a Global Network



Citi Works London

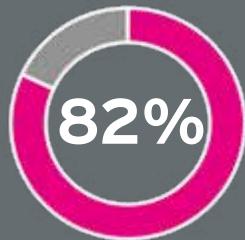


Global Findings...

"I like the open office design, and the fact that **people communicate more** and are more accessible on the open floor plan."



of staff in **Tokyo** said individuals feel more productive



of staff in **Wilmington** are satisfied with the new physical workplace, including **everyone who moved out of individual private offices**



satisfied or extremely satisfied with **access to people and resources** needed to work effectively

A 20% increase in satisfaction from before the move

- Extremely Satisfied
- Satisfied
- Dissatisfied
- Extremely Dissatisfied



agree that the new workplace **promotes the development and sharing of knowledge and ideas**

Choice Space Performance

Availability:
50% rating increase



Functionality:
18% rating increase



Proximity:
8% rating increase



...leading to Improvements

As Citi Works continues to be rolled out across the world, we take the constant evaluation of projects seriously, in order to continuously improve the program, and the next set of implementations.

Design Implementation

- Widespread design refinement including lockers, and open collaborative
- Design refinement to open collaborative areas
- Furniture, lighting, and technology procurement refinements

Change Management Approach

- Role of business management support and advocacy
- Engagement with senior leadership
- Critical role of site leadership in multi-group projects



Don Callahan

Head of Operations & Technology



03

What it Means for Me



Your office is now a neighborhood

Citi Works Shanghai

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You're
gaining a
variety of
spaces meant
for quiet
focus

Citi Works Shanghai

Gensler





You're
gaining a
variety of
spaces meant
for real
collaboration

Citi Works Tokyo

Gensler

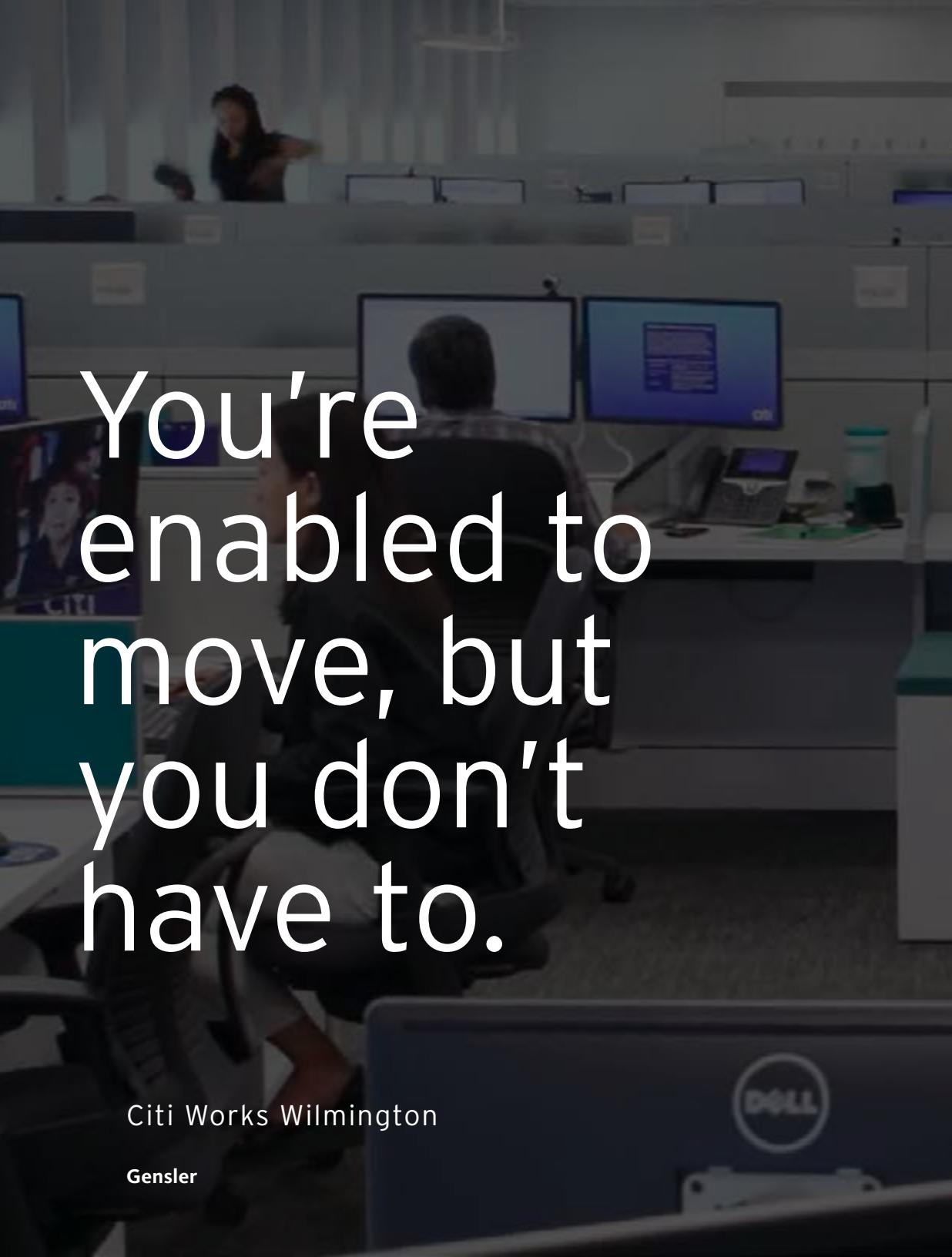
You're
gaining
access to
improved
technology

Citi Works London

Gensler

26





You're
enabled to
move, but
you don't
have to.

Citi Works Wilmington

Gensler



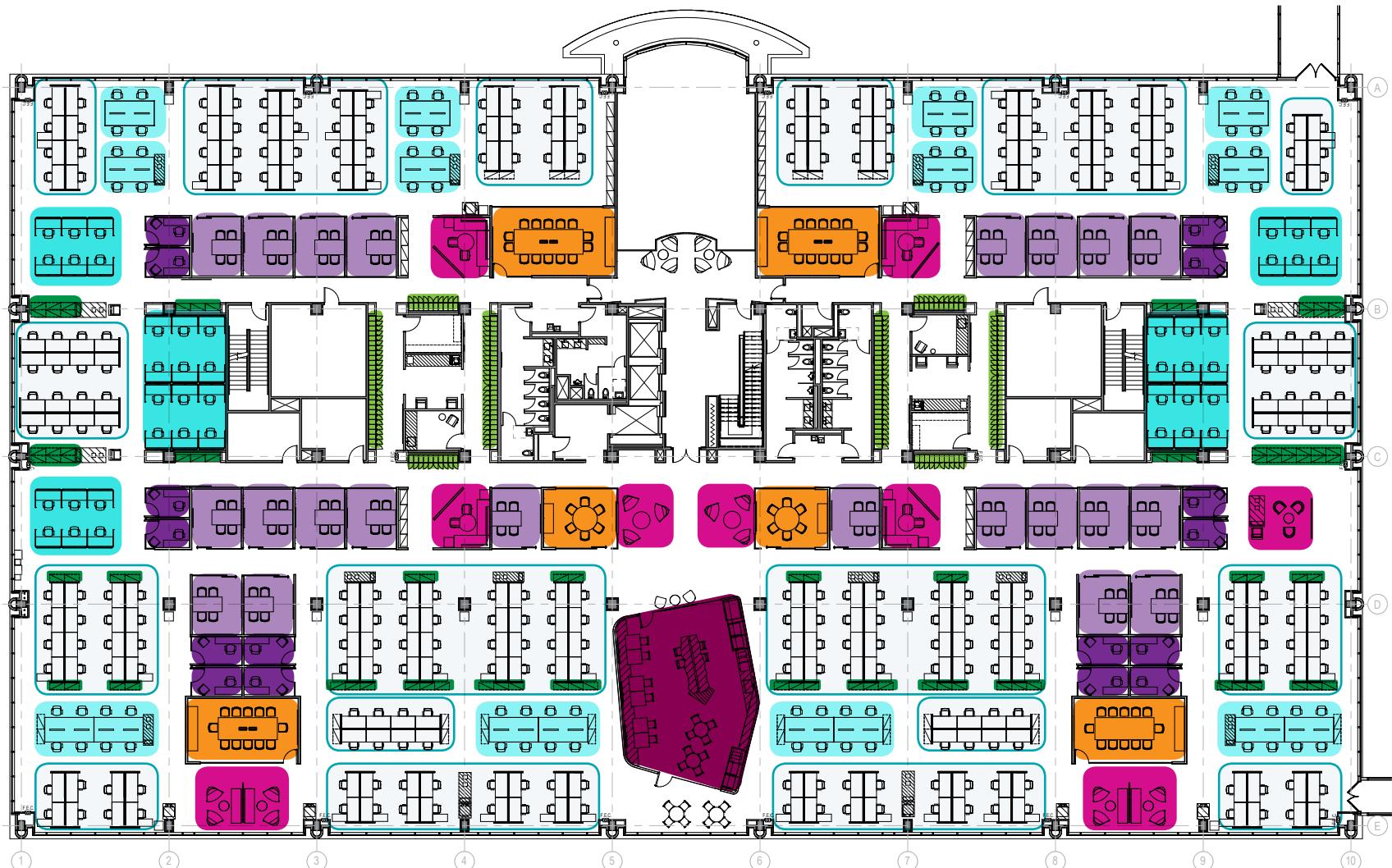
B2 Choice + Variety

Primary

- Flex Seat
- Shared Tables
- Focus Pods

Choice

- 11 Open Collab
- Work Cafe
- 22 Huddle Rooms
- 16 Touchdowns
- 6 Conference Rooms
- Personal Storage
- Shared Storage



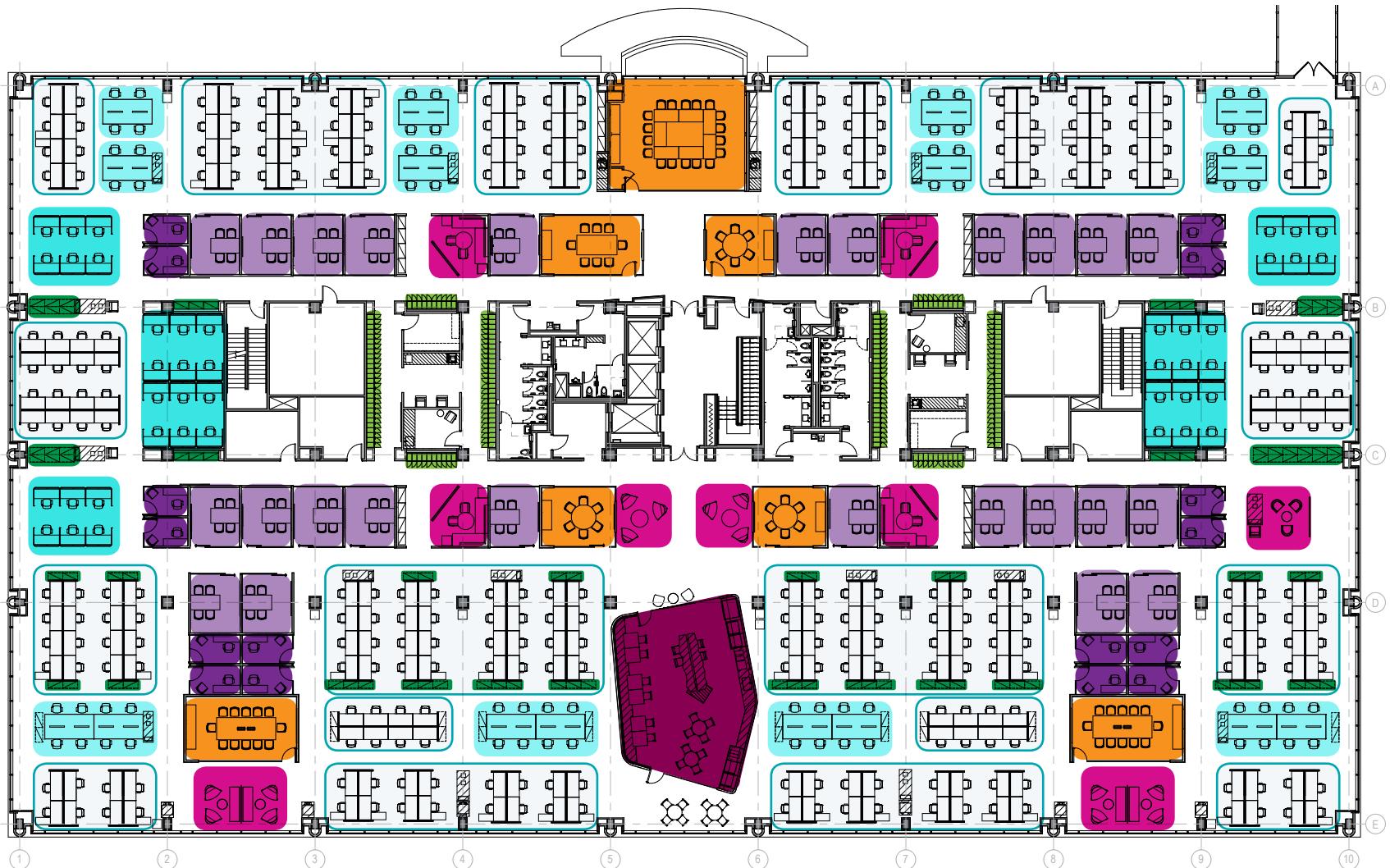
B3 Choice + Variety

Primary

- Flex Seat
- Shared Tables
- Focus Pods

Choice

- 11 Open Collab
- Work Cafe
- 25 Huddle Rooms
- 16 Touchdowns
- 7 Conference Rooms
- Personal Storage
- Shared Storage



04

Utilization and Occupancy

Utilization over 12 months

Building B
(April 2016 - October 2016)

72%

Average Peak utilization
for **159** people with **162** seats

Building I
(October 2016 - January 2017)

79%

Average Peak utilization
for **231** people with **175** seats

Building B
(June 2017)

355

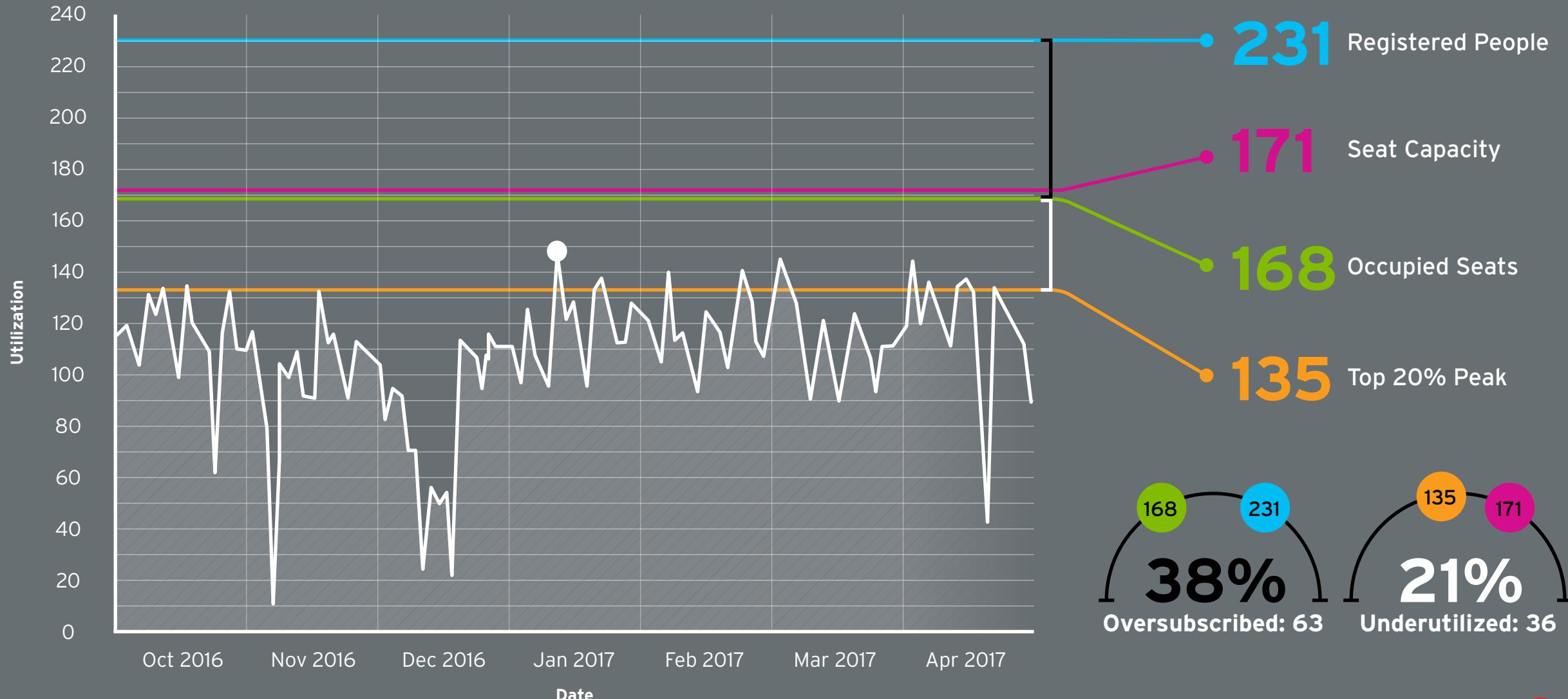
People (YE2017)

Leveraging **1 : 1.3**

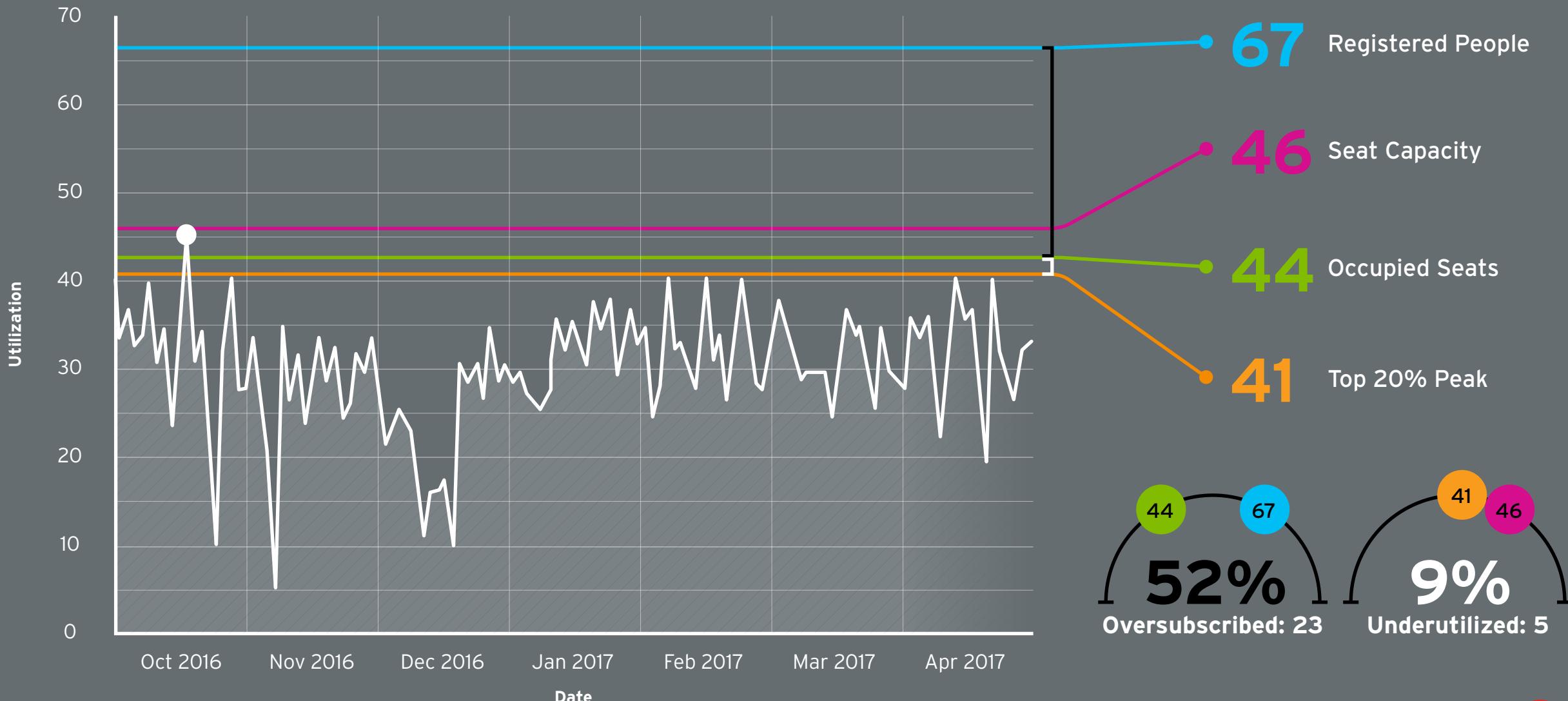
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273 Seats

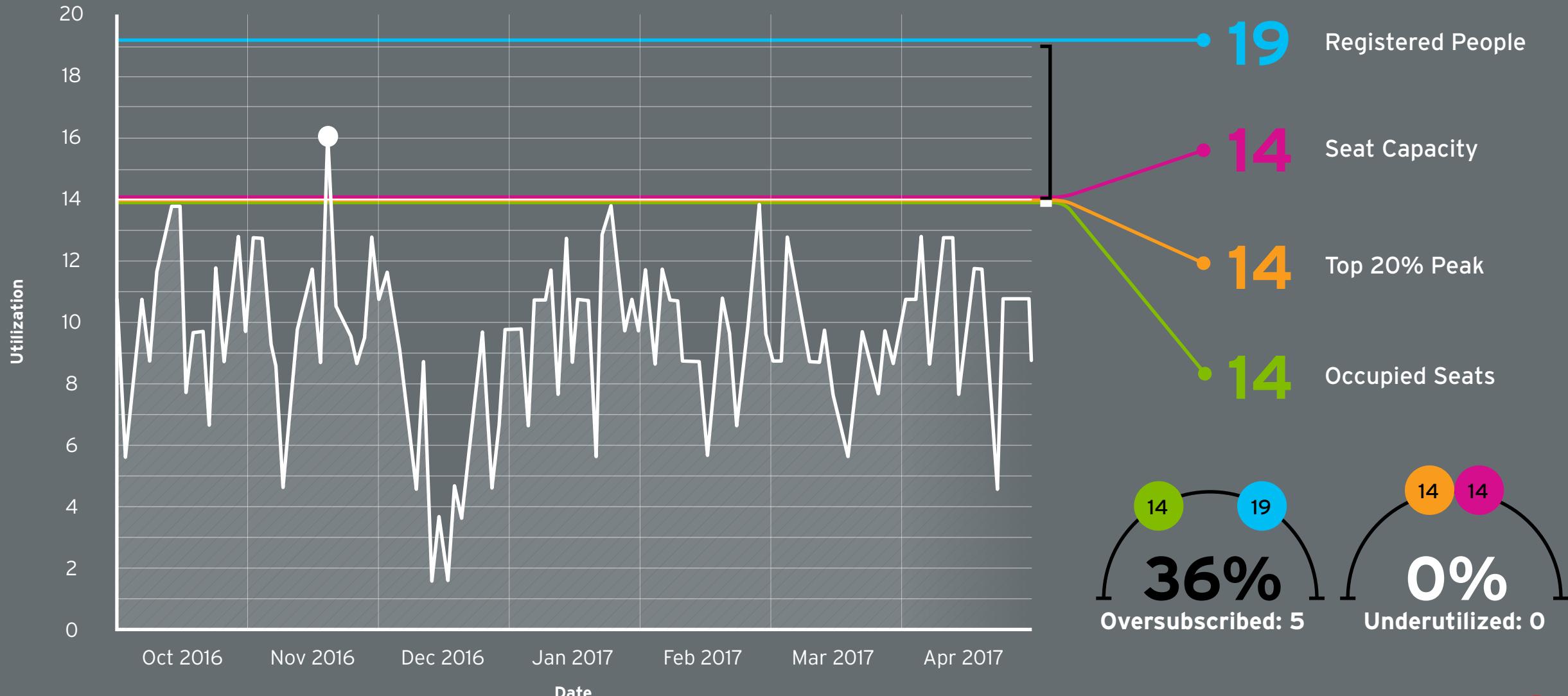
Summary



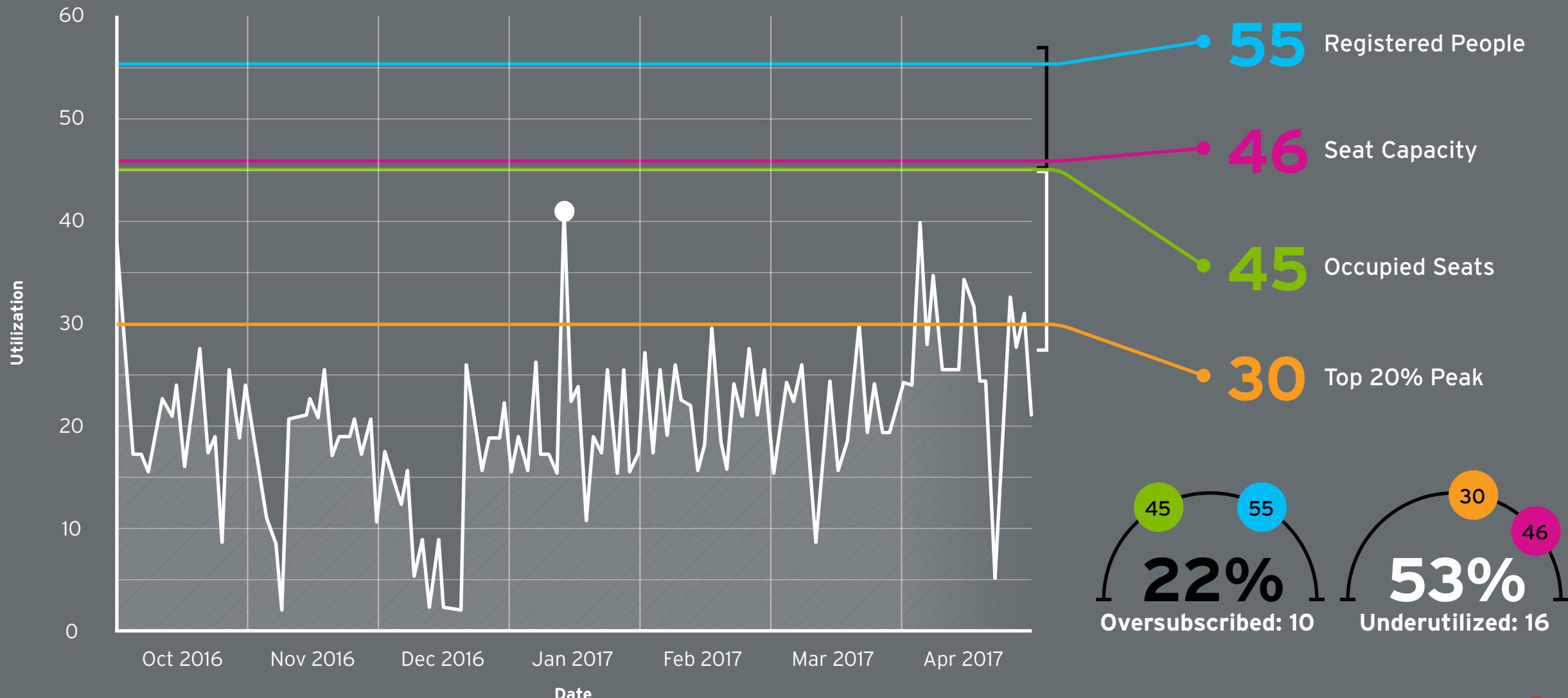
Custody Issuer Open Wealth Tech



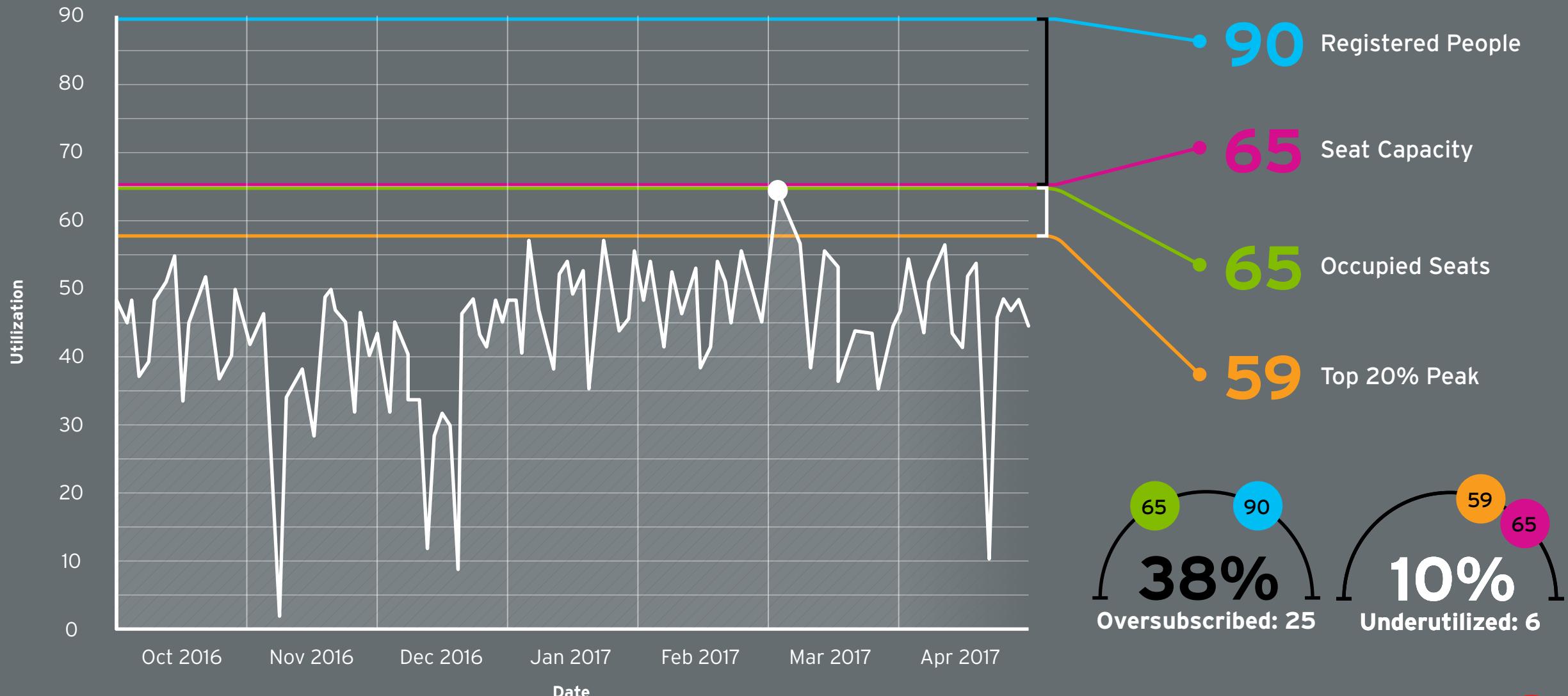
ICG Production Support



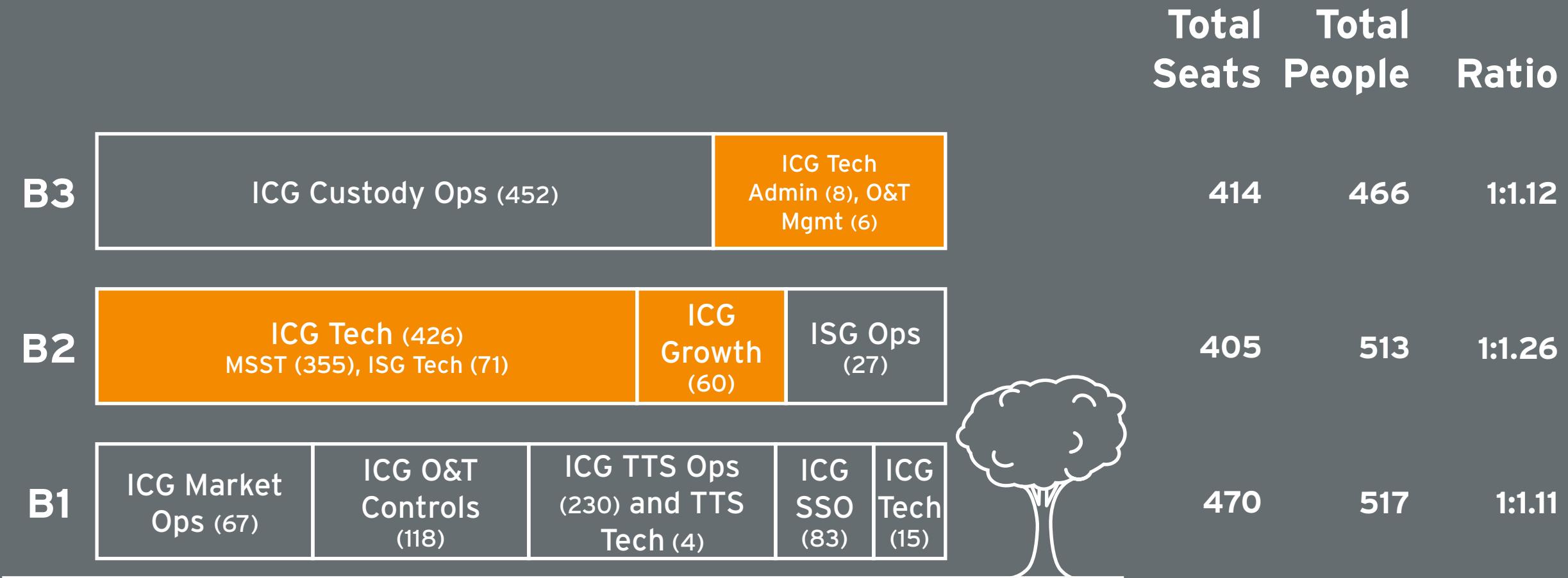
Investor Services Tech



Operations



Building B Q3 Stack Plan



Neighborhood Plans

Building I2

- MSST CMOT
- MSST Custody



Neighborhood Plans

Building I3

MSST IST

MSST CMOT

MSST Custody



Approach



Change Management

The Citi Works Change Management program readies employees to enter their new environment by arming them with the knowledge and resources necessary to comfortably function in the new space.

Example Activities Include

Leading In The Open

Technical Training

Change Champions Forum

Protocol Worksession

Room Reservations

Leveraging seat types

Accommodating setup requests

All Staff Town Hall

Regular Communications

What questions
do you have?