



# Portfolio Forecasting

Evaluate, forecast, and allocate space needs and associated occupancy costs using multiple scenarios and time periods

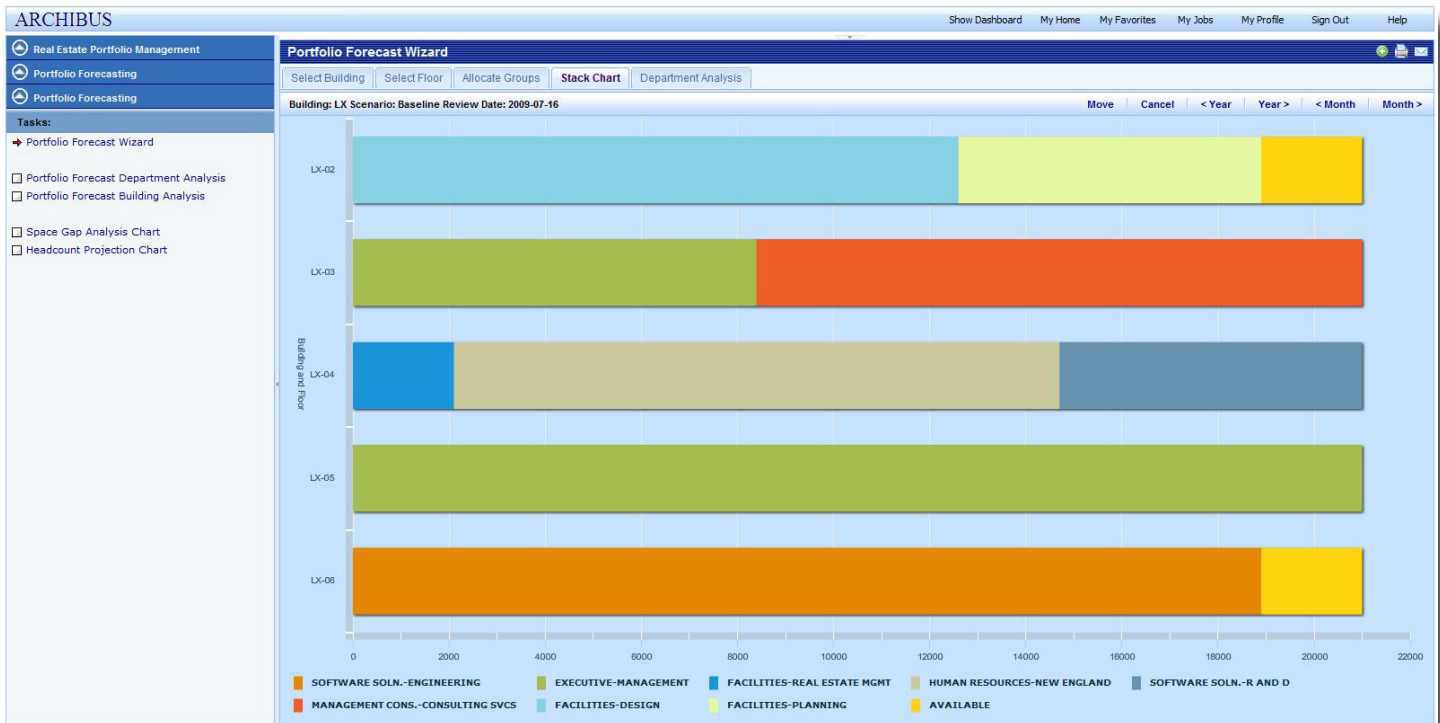
Accurately predicting space needs and occupancy costs is an ongoing challenge in dynamic organizations where churn, organic growth, mergers/acquisitions, and other factors create both uncertainty and opportunity. Web-based ARCHIBUS Portfolio Forecasting is an interactive forms-based solution that supports insightful space forecasting using alternative scenarios. It also allocates organizational groups to appropriate locations and links estimated occupancy costs to the groups incurring them. Portfolio Forecasting's analytics and "what-if" capabilities let users review historical space/cost allocations and project future scenarios based on user-defined time periods.

## Reports and Summary Tables:

- Baseline Portfolio Scenarios and Alternative Scenarios
- Stack Chart
- Space Gap Analysis
- Headcount Projection Chart
- Portfolio Forecast Department Analysis
- Cost Forecast Department Analysis

## Benefits

- Delivers structured information and decision support for space/master planning
- Provides consistent multi-year space/cost forecasts without having to use a CAD tool
- Reduces administrative costs through rapid projection and allocation capabilities
- Projects annual costs to departments/cost centers based on space allocation forecasts



Improve visualization of space allocation forecasts with drag-and-drop stack diagrams for group moves between floors



## Deliver Informed Space/Master Planning

Identifying and disposing of underutilized space is one of the most effective and significant ways to reduce occupancy costs. Similarly, correctly estimating when more space will be needed is critical to enhance operational efficiency and quality of work-life. ARCHIBUS Portfolio Forecasting provides a single, comprehensive way of tracking and analyzing historical and current space usage in order to make informed future space planning strategies. Centralized data and advanced visualization and planning tools aid in accurately predicting the impact of future organizational growth, or contraction, on the existing space portfolio. With Portfolio Forecasting, managers can finally realize greater precision in estimating space needs, and optimizing the use of owned or leased facilities.

- Provide automated decision support for high-level space and master planning
- Generate portfolio forecasts using analysis reporting on a per building and per organization basis
- Improve space allocation planning across all groups and buildings using Gap Analysis charts and other tools
- Refine visualization of space allocation with reconfigurable stack diagrams of the space used by an organization or group occupying multiple floors
- Create alternative space projections for comparison and evaluation using Portfolio Scenario tools

## Provide Consistent Multi-Year Forecasts

Portfolio Forecasting lets managers use historical and current information to accurately project facility costs based on estimated departmental and group needs. Users can easily develop cost forecasts and distribute costs more equitably through precise understanding of space/group relationships.

- Provide forecasts in a single, consistent format without having to rely on CAD tools
- Forecast and allocate multiple space use configurations by group over multiple time periods
- Develop cost forecasts and chargeback costs easily by proportionately distributing building recurring rent, maintenance, and other occupancy expenses to their respective groups
- Project costs by building over designated time periods

## Reduce Administrative Costs

Forecasting portfolio space needs and costs is only part of the goal for real estate and facilities managers. Another necessary ingredient in creating more cost-efficient operations is controlling the often underestimated administrative overhead. Portfolio Forecasting addresses that concern by automating and streamlining forecasting and allocation tasks with an intuitive toolset that delivers results in a fraction of the time normally required to execute these pursuits.

- Automate processes that quickly allocate space to organizational groups
- Develop rapid space projections at the organization/group level based on room-level inventory data
- Enhance visualization, analysis, and planning using Gap Analysis, Stack Chart, and other features
- Move groups easily between floors using the drag-and-drop capability within the Stack Chart

## Forecast and Allocate Annual Costs

With the application's Cost Forecasting tools, users can allocate building costs to the departments/cost centers that are projected to occupy the future spaces indicated in the portfolio forecast. The Portfolio Forecasting application can then calculate the annual building cost and distribute it proportionately to all departments/cost centers in the building.

- Centralize occupancy expenses such as rent, maintenance, and/or utility costs in the Recurring Costs table
- Review historical cost allocation and project future space/cost scenarios based on user-defined time periods
- Leverage existing cost data in other ARCHIBUS applications such as Lease Administration or Cost Administration for comprehensive expense profiling and space/cost forecasts

