

2024

ESG CASE STUDIES GUIDE

WE DIDN'T COME THIS FAR, JUST TO COME THIS FAR.

Raising the quality of our service and reducing our impact on the planet

Better begins now



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EXECUTIVE SUMMARY

Asset Services Case Study Guide for ESG

Collecting case studies is crucial for fostering learning and continuous improvement. It helps disseminate knowledge across the organization, inspires innovation, and enables benchmarking with peers. These factors collectively contribute to the organization's growth and success, raising the quality of our services and reducing our the impact on the Planet.

With this guide, we aim to support and guide you in writing good, relevant, and effective case studies. This will help us collect and retain knowledge and spread valuable insights, best practices, and management solutions that can assist colleagues in improving sustainable building management and stakeholder involvement.

Our objective is to compile and circulate real-life cases that showcase our expertise and know-how on sustainability, providing opportunities for everyone to learn, improve and get inspiration.

Your contribution to collecting case studies is extremely valuable and of utmost importance. With your support, we will be able to:

- Showcase success stories
- Encourage Knowledge sharing
- Support Decision Making
- Foster Continuous Improvement
- Built a Knowledge Repository
- Facilitate Peer learning
- Adapt to Changing Environments

We count on you!



01

DEFINITION

What is a case study and why it's important?

DEFINITION

Case study

Business cases recount real-life business or management situations that present readers with a dilemma or uncertain outcome.

A case study describes the scenario in the context of the events, people and factors that influence it and enables the readers to identify closely with those involved.

Why are they valuable?

- Real-World application: Provide practical examples of how concepts, features, and actions were implemented in real-life asset management and the benefits
- Engagement: Provoke interest and draw the reader to make learning more engaging by telling a story and creating the curiosity to reproduce it, when applicable
- Knowledge management: Retain and share the knowledge at EMEA level, creating a platform to bring more efficiency to the daily management
- Critical Thinking: Give insight into the context of a particular challenge or process that can happen in several assets;
- Call to action: Help Teams identify useful information and recognise it as being relevant to their work - [motivate the reader to take action!](#)

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INSERT TITLE HERE

LOREM IPSUM

Better begins now

CLIENT	LOCATION	SERVICES
Client Name	Market Here	• Client Accounting
REAL ESTATE TYPE	SQUARE FOOTAGE	• Property Management
Retail	45,000 SF	• Project & Development Services

BACKGROUND

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Insert Image Here

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O2

OBJECTIVE

Capture value derived from sustainability and communicate it for business efficiency and improvement

OBJECTIVE

Capture value with a case study



Exploiting opportunities to create value

Capturing value from sustainability involves integrating sustainable practices into business operations in a way that not only benefits the environment, but also enhances the organisation and asset's performance and competitive advantage.

Quantify costs and benefits whenever possible

Measuring costs and benefits is a crucial aspect of decision-making in business. It involves evaluating the economic, social, and environmental impacts of an asset or decision to determine its overall value.

DEFINITION

Driver, opportunities and measuring

Value driver	Adding value	Measuring the value
Compliance	<ul style="list-style-type: none"> • Ensure legal compliance • Ensure compliance with real estate standards ISO 14001, BREEAM, LEED, WELL • Future proofing assets for stringent requirements to come 	<ul style="list-style-type: none"> • Value of fines and/or penalties avoided
Short-term profitability Cost savings	<ul style="list-style-type: none"> • Operational cost savings (energy, water and waste management efficiency initiatives) • Short return on investment (ROI) • Cost savings after payback • Additional revenues 	<ul style="list-style-type: none"> • Cost savings (OPEX) resulting from investments and management measures
Competitiveness / Brand value	<ul style="list-style-type: none"> • Protects the business against reputational risk • High impact ESG initiatives can be unique and add value to our brand 	<ul style="list-style-type: none"> • Corporate brand value • Asset/Portfolio brand value • Value of press coverage on sustainability
License to operate	<ul style="list-style-type: none"> • Stakeholder expectation for buildings under operation to reduce the environmental impact and contribute to the community well-being. • Social Impact Initiatives (particularly around health & Well-being, awareness, education and skills) create further support from stakeholders 	<ul style="list-style-type: none"> • Increase the interaction with the stakeholders/community, improving the social value • Influence positively the perception of public institutions might impact permissions/licensing processes • Increase visitor's affluence • Increase potential tenants' interest and willingness to occupy the building

DEFINITION

Driver, opportunities and measuring

Value driver	Adding value	Measuring the value
Access to capital	<ul style="list-style-type: none">• Data availability to answer to stakeholders• Improve performance and data reporting to feed Client Corporate Reports• Support being an Article 8° or 9° to get capital for investing with more interesting financial conditions (Sustainable Finance)• Create building value through benchmarking with peers (GRESB or PRI)• Reduce void rates	<ul style="list-style-type: none">• Increase the leasing value per sqm• Increase the market value of the building
Long-term profitability/Retaining asset value	<ul style="list-style-type: none">• Prepare and protect assets against anticipated legislation and trends	<ul style="list-style-type: none">• Value of fines and/or penalties avoided• Cost savings (OPEX) resulting from investments and management measures• Avoid future Carbon Taxation



03

OUTLINE

How to prepare a case study

OUTLINE

Content



OUTLINE

Title

- Start with a bang. Use action verbs.
- Make it brief. Writing a subject line that is 50 characters or fewer is generally recommended.
- Show some imagination. Titles should catch the attention
- Include achievements/savings whenever possible. It calls others to action.
- Be sure to use keywords (environmental aspect, technology/action, etc)
- Appeal to your readers. What's relevant to them?

Some examples:

EU Sustainability Rules Begin to Bite

80% of Dealmakers Prioritize ESG Due Diligence in Transactions

Increasing water efficiency at a 'higher water risk' in XXX

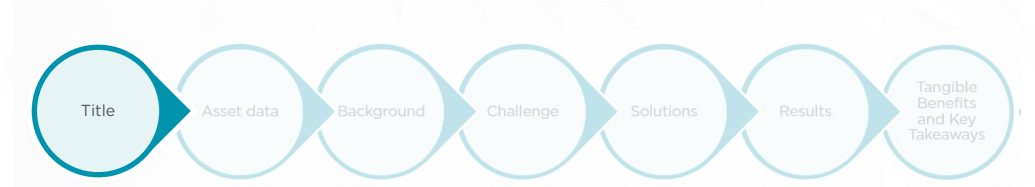
Engaging with contractors to deliver high Safety and Health standards

Efficient equipment and creative campaigning save 900kWh in XXX

XXX mobilises the local community to protect forests

XXX saves 7,000kWh of electricity with a lighting solution for lifts

WOULD YOU CONTINUE READING?



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INSERT TITLE HERE

LOREM IPSUM

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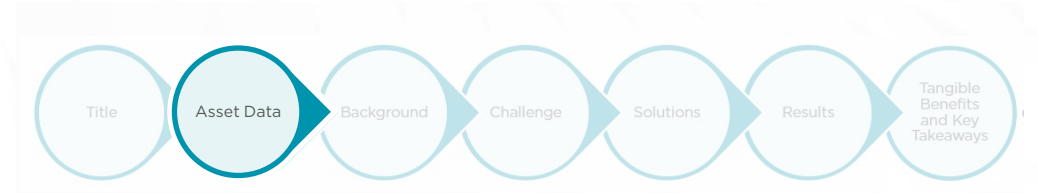
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OUTLINE

Asset data

Fill in with the required data:

- Client – use the commercial name of the Client
- Location – City and Country
- Real Estate Type – Choose the applicable
 - Office
 - Industrial
 - Retail
- Square footage – Use the Gross Building Area (sqm)
- Services – Choose the applicable
 - Portfolio Management
 - Building Management
 - Facility Management
- ESG Aspect – Choose the applicable
 - Environment (Water, Energy, Waste, Biodiversity...)
 - Social
 - Governance



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OUTLINE

Background

Provide a narrative of the situation and offer more details about the asset/portfolio, process, timing, and all relevant variables for the challenge.

- Introduce the topic and explain why it is important or relevant.
- Provide the context including any relevant historical, social or economic background information that will help the reader understand the situation better.
- Set the scene by providing a detailed description of the setting.

Notes:

- You may also mention technical or theoretical issues that arise from the situation.
- The narrative is presented usually in chronological order.
- It is important not to use language that might bias the presentation in any way, such as ‘unfortunately, the decision taken was to do x’.



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INSERT TITLE HERE

LOREM IPSUM

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OUTLINE

Challenge

- Identify the Challenge
 - Clearly state the main challenge you will focus on.
 - Ensure the problem is specific, measurable, and relevant.
- Highlight the Stakeholders
 - Introduce main individuals, groups, or organisations involved.
- Explain the significance
 - Describe why this problem is important and worth solving.
 - Highlight the impact of the challenge on the community involved.
- Use Data and Evidence:
 - Support the description with relevant data, statistics, or findings.
- Engage the Reader:
 - Use a narrative style to make the challenge section engaging.
 - Pose questions or scenarios that encourage the reader to think critically about the problem.



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OUTLINE

Challenge

Notes:

- Choose your challenge carefully, do not present one that is too complex or oversimplified.
- The challenge has to be relevant to your reader, and you may present it in the decision-maker own words.
- The challenge is presented but not the solution. The readers will have to continue reading to know the answer.
- A valid strategy is to make the readers think of the solution before continue reading, by asking directly what would the readers do next, or present 2 or 3 scenarios and make the reader wonder what the pros and cons of each one are.

WOULD YOU LIKE TO SOLVE THIS PUZZLE?



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INSERT TITLE HERE

LOREM IPSUM

Better begins now

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OUTLINE

Solution

The solution describes the actions on the matter, the choices made, and the strategy followed.

- Introduce the Solution
 - Mention the main goal or objective of the solution.
 - Discuss the reasoning behind choosing the solution.
 - Begin with a brief overview of the solution implemented.
 - Explain why it was considered the best approach to address the problem.
- Detail the Implementation Process
 - Describe the specific steps or actions taken to implement the solution.
 - Include any strategies, methodologies, or tools used.
 - Provide a timeline of key activities, if relevant.

Notes:

- Show the value created with the solution, what were the benefits, the advantages, the key learnings that are distinctive (run away from 'commonplaces'), and the obstacles to its implementation.
- When presenting the solution, always sustain your argument with facts and figures about why that was the best way to go (up to that moment).



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INSERT TITLE HERE

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CHART TITLE

STATEMENT

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RESULTS

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TANGIBLE BENEFITS AND KEY TAKEAWAYS

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OUTLINE

Results

- Present Supporting Data
 - Use data or statistics to demonstrate the effectiveness of the solution.
 - Include before-and-after comparisons or other relevant metrics.
- Discuss Challenges and Adjustments
 - Acknowledge any challenges/obstacles faced during implementation
 - Describe how these challenges were addressed or overcome.
 - Mention any adjustments or modifications made to the original plan.
- Showcase Results and Outcomes
 - Detail the results achieved, highlighting key outcomes, improvements, or successes.
 - Use specific examples or case metrics to illustrate the impact.
- Include Testimonials or Feedback
 - Incorporate quotes or feedback from stakeholders involved in or affected by the solution.
 - Use testimonials to add credibility and personal perspectives.



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INSERT TITLE HERE

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CHART TITLE

Category	Series 1	Series 2	Series 3
Category 1	4.2	2.1	1.8
Category 2	2.5	4.5	1.9
Category 3	3.5	1.8	2.8
Category 4	4.5	2.8	4.8

SOLUTION

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OUTLINE

Results

- Reflect on Lessons Learned
 - Discuss any lessons learned from the implementation process and.
- Conclude with Future Recommendations
 - Offer recommendations for future actions or improvements.
 - Suggest ways to sustain the positive outcomes achieved.

Notes:

- The closure presents again the challenge and solution in a nutshell and goes back to the introduction by answering the action question (if you decided to use it).
- You have to emphasize the key best practices to the reader.
- Now make perfectly clear what is the general business knowledge that under similar conditions can be replicated.
- Make a call to action, if necessary in direct discourse, to what the reader should do now to also create value (by approving, designing, engaging, or even implementing).



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OUTLINE

Tangible Benefits and Key Takeaways

In addition to the details captured in the Solution & Results sections, this section highlights the tangible benefits our actions provided to the client. Did we save them money or time? Discuss the specific advantages our work and services brought to the client.

- This section should be concise and impactful.
- Use clear, direct statements to ensure that if any key points were missed in previous sections, they are captured here.
- Emphasize how we can save the client time, money, and reduce headaches.
- Utilise quotes to back-up your claims.

WAS THE VALUE CREATED CLEARLY COMMUNICATED?



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INSERT TITLE HERE

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STATEMENT

“
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TANGIBLE BENEFITS AND KEY TAKEAWAYS

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OUTLINE

Don't forget

Add photos and graphics that demonstrate your case.

1 IMAGE WORTH MORE THAN 1,000 WORDS

Whenever possible also add a Statement from a Stakeholder that benefited from the case, it could be the landlord, tenant, building user or even a person from the community. It gives:

- Transparency
- Trust
- Accountability
- Support others to take action



CUSHMAN & WAKEFIELD

INSERT TITLE HERE

LOREM IPSUM

Better begins now

CLIENT	LOCATION	SERVICES
Client Name	Market Here	• Client Accounting
REAL ESTATE TYPE	SQUARE FOOTAGE	• Property Management
Retail	45,000 SF	• Project & Development Services

CHART TITLE

Category	Series 1	Series 2	Series 3
Category 1	4	2	1
Category 2	2	4	1
Category 3	3	1	2
Category 4	4	2	5

STATEMENT

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SOLUTION

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RESULTS

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TANGIBLE BENEFITS AND KEY TAKEAWAYS

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OUTLINE

WAS IT WORTH READING IT?





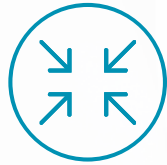
04

TOP TIPS

Also consider...

TOP TIPS

1. Use general to specific



- In the challenge section, begin with a general discussion of the issue and only then, describe the specific challenge
- In the solution section use the opposite sequence. First, describe how the solution solved this specific challenge; then indicate how it can help resolve this issue more broadly within the industry.
- Beginning more generally draws the reader into the story; offering a specific example demonstrates concretely, how the solution resolves a commonly faced issue; and concluding more generally allows the reader to understand how the solution can also address their problem.

2. Describe the specific situation



- Determine as quickly as possible the specific situation with which the protagonist will be wrestling
- The situation will determine the issues and the analysis that the case will focus on. It will help building in the required information and leading the reader through the story.

3. Prepare an outline



- Often, the final structure of the case will be different as you tell the story since you will develop new insights about how best to present the material.
- But, an outline is a useful starting point, and it will help you develop a first draft of the case.

TOP TIPS

4. Use Clear and Concise Language



- Write in a clear, concise, and engaging manner.
- Avoid jargon and overly complex sentences.

5. Include Visuals

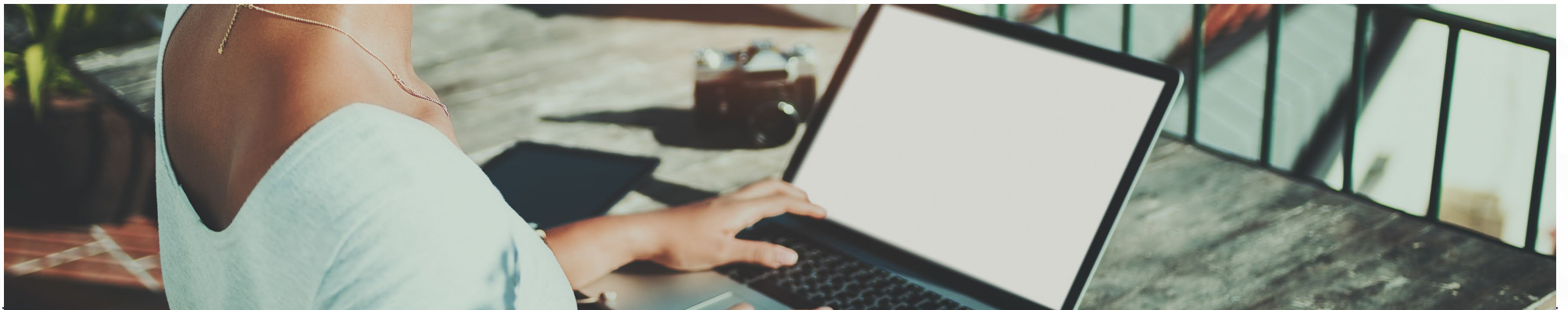


- Use charts, graphs, or images to illustrate key points and provide visual context.

6. Write the first paragraph



- The first paragraph (or first page) captures the time, the protagonist, the issues, and the pressures that make the decision or challenge an important one.



TOP TIPS

7. Don't overthinking it



- Just write. It is only the process of writing that will drive the discovery of what information is missing, and what data you need to complete the story.

8. Use the template



- The template serves as a roadmap for the case study process, and ensures that the document looks, feels and reads consistently.
- Visually the template helps build the brand and procedurally, it simplifies the writing.

9. Use subheadings



- Use as many subheadings as possible
- This lets the reader scan through the document and get an overview. The reader should be able to get the main points of the case study simply by reading the headings.



TOP TIPS

10. Review, revise and edit



- Proofread to ensure clarity and coherence.
- Revise as needed to improve the flow and readability.
- And if that is not enough, ask for help from some colleague.

11. Ask permission



- Please be sure to have permission from Clients, third parties, etc. to use their images and testimonials in your case study

GOOD WORK!





ABOUT CUSHMAN & WAKEFIELD

Cushman & Wakefield (NYSE: CWK) is a leading global commercial real estate services firm for property owners and occupiers with approximately 52,000 employees in nearly 400 offices and 60 countries. In 2023, the firm reported revenue of \$9.5 billion across its core services of property, facilities and project management, leasing, capital markets, and valuation and other services. It also receives numerous industry and business accolades for its award-winning culture and commitment to Diversity, Equity and Inclusion (DEI), sustainability and more.

For additional information, visit www.cushmanwakefield.com.

Better begins now

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