



Transamerica needed help with its IWMS challenges

**Location:** United States  
**Industry:** Financial Services

**11,700** employees

**20** owned buildings

**110** leased buildings

**3.5M s.f.** portfolio

**250** average active users

**Since 2008** client relationship

## Overview

The Transamerica Corporation, headquartered in Cedar Rapids, Iowa, is one of the United States' largest financial service companies, providing insurance, investments, and more to approximately six million customers.

## Challenge

Transamerica acquired several integrated workplace management system (IWMS) modules—Real Estate Manager, Workplace Operations Manager, Facilities Manager, and Capital Projects Manager—and engaged a third-party business partner to assist with the initial, four-phase implementation. However, four years after the initial rollout, Transamerica was still struggling with:

- Implementation and system performance problems
- User adoption
- Clear ROI for the initiative

To address this, Transamerica engaged JLL Technologies (JLLT) to conduct a Health Check of its system. JLLT's Health Check is a prepackaged solution designed to help end users and system administrators articulate pain points and develop an achievable roadmap to use the IWMS to its full potential. Through this process, JLLT also found gaps in:

- Data structuring, which was causing difficulties in reporting
- Understanding the consequences of design for immediate versus long-term needs
- Some of Transamerica's key datasets

## Solution

Once engaged, JLLT's project team conducted a series of on-site workshops alongside key company stakeholders and end users to better understand:

- Current organizational roles and responsibilities pertaining to the software and specific configurations, customizations, and integrations
- The current state of Transamerica’s business processes and the technology enablement surrounding those processes

Once the current state was fully understood, JLLT’s team conducted a “visioning exercise,” with the goal of defining and planning strategic goals for the IWMS and its role alongside other key enterprise systems. Following this, the team developed an in-depth “Findings and Recommendations” report that identified issues and opportunities, gaps, and future-state priorities and included a short- and long-term implementation roadmap for remediation and enhancement. The roadmap outlined the specific steps Transamerica needed to take to remediate the issues, modernize the technology, remove unnecessary system customizations, and clean up its data.

## Outcomes

Since implementing the roadmap, Transamerica and JLLT developed a trusted partnership that has spanned more than six years. They’ve worked together on developing and executing roadmap projects, and JLLT has provided direct mentoring and coaching to Transamerica’s internal functional and technical support group, helping them become more self-sufficient for many ongoing tasks. This has allowed the company to develop a cutting-edge technology platform and plan while working within the confines of a closely monitored budget. Joint accomplishments include:

- A successful upgrade and modernization of the platform (on time and within budget) that provided overall performance improvement, including significantly reduced processing time and increased reporting efficiency
- Re-implementation of Real Estate Transactions and Operations and Maintenance modules—previously, both modules had been heavily customized, causing performance and reporting issues
- A normalization of key data elements to address previous reporting and integrity gaps by removing ambiguity related to organization and code center structures, helping Transamerica fully utilize its complex ledger systems while retaining the out-of-the-box IWMS architecture

## Scope of services

- ✔ Current-state assessment and technical roadmap development
- ✔ Software evaluation
- ✔ System analysis and health check
- ✔ Platform enhancements

## Results

- ✔ Proven methodology, tools, and facilitation
- ✔ Access to SME resources and best practices
- ✔ Upgraded IWMS platform and implementation of additional modules
- ✔ Ability to capture the total cost of space across the portfolio by tracking internal chargebacks and external invoices

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*We are incredibly happy with our relationship with JLLT; we feel very comfortable and confident about the support and guidance we receive from JLLT staff.”*

— Facilities Technology Lead

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*JLLT’s team was impressive. They asked the right questions. They challenged us to look deeper and investigate issues. We came away with a roadmap of where to go from here.”*

— IT Project Manager

**Questions? We’ve got answers. Learn more about JLLT, or email us at [helloJLLT@jll.com](mailto:helloJLLT@jll.com).**

JLL Technologies (JLLT), a division of JLL, a world leader in real estate services, helps organizations transform the way they acquire, operate, manage, and experience space. A first-of-its-kind team combining builders of high-growth tech companies and commercial real estate experts, JLLT delivers a comprehensive technology portfolio of purpose-built solutions and leading edge, venture-backed companies to meet and exceed the industry’s demands for better business intelligence, workplace experience, and smart building platforms. Learn more at [www.jllt.com](http://www.jllt.com).