



Innovative Real-Estate Management Firm Transforms Data Storage and Collaboration

Overview

Country or Region: United States

Industry: Professional services–Real estate

Customer Profile

Transwestern is a commercial real-estate service, development, and investment management firm based in Houston, Texas. It was founded in 1978 and employs 1,680 people.

Business Situation

Transwestern struggled with data-governance and data-accessibility challenges.

Solution

Transwestern redeployed its legacy intranet to Microsoft SharePoint Server 2010 for an entirely new approach to data management and storage.

Benefits

- Savings of U.S.\$300,000 annually in new-assignment costs
- Data-storage down 80 percent
- Tier 1 data-storage savings of \$150,000 annually
- Instant access to institutional knowledge
- Rapid startup for new projects
- More productive working environment for teams

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Eugene Kesselman, Chief Information Officer, Transwestern

Transwestern is one of the largest privately held commercial real-estate service, development, and investment management firms in the United States. Recently, the company found that its distributed approach to data management and storage could not keep up with the demands of growth. The company addressed the challenge by migrating its intranet from a content-management system to Microsoft SharePoint Server 2010 and enhancing intranet functionality. Now, Transwestern has a more centralized approach to data management and storage and a more collaborative environment for assignment teams. As a result, the company is saving at least U.S.\$300,000 annually in project costs and \$150,000 in data-storage costs. Additionally, Transwestern employees have instant access to a wealth of institutional knowledge for higher team productivity and a more effective approach to winning new business.

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Situation

Since its founding in 1978, Transwestern has provided a broad range of commercial real-estate services to clients in office, retail, industrial, multifamily, healthcare, and other sectors. From its headquarters in Houston, Texas, and its 28 corporate and 245 branch offices across the United States, the company leases and manages more than 1,215 properties that encompass more than 255 million square feet of commercial space.

Transwestern supports the entire life cycle of commercial real estate, from development, management, and leasing to tenant advisory, acquisition, and disposition. And it does so in a way that has earned it repeated recognition for its sustainability and employment practices—eight years running as a U.S. Environmental Protection Agency ENERGY STAR award winner and multiple acknowledgments from regional publications in their “Best Places to Work” competitions.

One factor behind Transwestern’s success is its innovative use of information technology, such as its early adoption of cloud computing and of server virtualization, now implemented through the Windows Server 2008 R2 Enterprise operating system with Hyper-V virtualization technology. “In our business, we must be committed to investing in technologies that maximize our efficiency in serving clients while minimizing the effort required from our team members and real-estate brokers,” says Eugene Kesselman, Chief Information Officer at Transwestern.

In keeping with this approach, Transwestern leadership recently considered how the firm could address

challenges surrounding data governance and data accessibility, particularly given the company’s widely distributed teams.

As Kesselman explains, properties under Transwestern oversight are handled by teams composed of employees, independent brokers or contractors, property managers, owners, and vendors, often based in multiple locations and always working with massive volumes of data. To communicate and collaborate, team members historically relied on phone and email. To store that email, as well as documents, reports, analyses, and other property-related data, team members used file servers installed at Transwestern corporate offices and at 150 of its branch offices.

This approach worked fine for many years. But growth of the company and the number of properties it oversees, as well as growth of digital documentation for architectural and engineering specifications, led to an equivalent growth in demands for file storage. “To launch a building-development assignment involved a gigabyte of data,” Kesselman says. “And this data grew exponentially over the property life cycle, because everyone who touched an emailed document stored a separate copy of it.”

Even more significant was the fact that this distributed approach to data management and storage made information very difficult to access, especially at the enterprise level. “It was increasingly challenging to control or access data that was stored on hundreds of individual hard drives and email folders and dozens of distributed file servers,” Kesselman says. “This means that despite all of the data-storage costs we were shouldering—including the

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costly Tier 1 storage required when employees used their email folders as file-management systems—we could leverage very little of the intelligence in that data.”

Solution

In mid-2010, Transwestern leadership decided to address the challenge by enhancing the legacy intranet—expanding and extending its functionality to provide teams with an entirely different model of data management and storage. Kesselman explains that to develop the enhancement, he and his colleagues considered using the content-management system that served as the intranet’s platform, but only briefly.

“Transwestern was familiar with the technology, its IT professionals were involved with its development, and they had supported it for nearly a decade,” Kesselman says. “But the technology was content-driven, and that was a problem. For the scalability and external-level security required for the intranet enhancement, the company needed a platform that was data-driven.”

For that reason, Transwestern leadership decided to redeploy the intranet to a different platform. They began looking closely at Microsoft SharePoint Server 2010, for two reasons. The first reason was the firm’s long experience with Microsoft technologies at the server and client level alike. The second was the support in SharePoint Server 2010 for external lists, activity feeds, web parts, social networking, and data acquisition—all of which Kesselman considered ideal for providing the kind of enhancements he and his team wanted. “Transwestern leadership did have concerns surrounding the challenges of redeployment,” Kesselman says. “But

after several of us attended a summit roundtable where other CIOs told success story after success story of working with SharePoint Server 2010, we were sold on it.”

Work began on the intranet redevelopment in October 2010 with a team that included certified Microsoft SharePoint developers, application developers, and representatives from human resources and marketing. In early January 2011, Transwestern rolled out TranSource, a new version of the company intranet based on SharePoint Server 2010 Enterprise. Just two weeks later, it rolled out OnePlace, an extension of the intranet that replaces the file-server infrastructure for data management and storage with project-specific collaboration sites. These sites were implemented through Microsoft SharePoint Server 2010 for Internet Sites, and they reside on servers that are based on Windows Server 2008 R2 with Hyper-V and Microsoft SQL Server 2008 Enterprise data management software.

Another component of the intranet enhancement is an implementation of unified communications (UC). Transwestern originally deployed UC for instant messaging (IM) and presence awareness by using Microsoft Office Communications Server 2007 R2. The company is now upgrading its UC to Microsoft Lync Server 2010 and the Lync 2010 client, a project that will add telephony capabilities and that is targeted for completion in mid-2012.

Transwestern is also retiring the file servers from its corporate and branch offices as it deploys the OnePlace collaboration sites for the teams that manage those properties. Kesselman anticipates completing the file-server

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retirement and collaboration-site establishment by 2012.

Benefits

The members of Transwestern leadership who envisioned and developed the intranet enhancement are welcoming a number of benefits. Data governance and data accessibility are more rigorous, data-storage requirements are reduced, and project startup and shutdown costs are dramatically lower. Teams are working more productively, and managers are matching employees with assignments more rapidly and effectively. Moreover, through the efficient development environment provided by SharePoint Server 2010, the company is well-positioned to implement future enhancements.

Project Payback in Eight Weeks

By retiring the file servers installed at branch offices and managed properties and replacing them with OnePlace collaboration sites, the company is eliminating the costs associated with server purchase, installation, licensing, and maintenance—approximately U.S.\$300,000 each year. “From these savings alone, the work we did with SharePoint Server 2010 will have paid for itself in eight weeks,” Kesselman reports.

In addition, by taking the project data that was stored on those file servers and consolidating it on centralized servers, Transwestern is achieving the data-governance and data-accessibility improvements that the company needed. “We have far more effective controls over the kind of data we store and how long we store it,” Kesselman explains. “We can access the valuable information in the data, and we can control its volume as well. Just consider that before we began making this change, we were managing

62 terabytes of data, and we will soon be managing around 12 terabytes—for a reduction of more than 80 percent.”

Improved Efficiencies for Business Gains

Perhaps the biggest benefit of the new model for data management and storage comes in the productivity of teams. “From engineering and architectural plans to legal documents, correspondence, progress reports, you name it—all data relating to a given property is shared and managed within a OnePlace collaboration site,” says Mark Doran, Chief Operating Officer at Transwestern. “Version control is simplified, change orders are executed more rapidly, internal and external team members are working more efficiently, and our clients reap the benefits. These are improvements essential to keeping existing clients and winning new ones.”

Furthermore, because team members are sharing documents through the collaboration sites instead of sending them as email attachments, Transwestern is lowering the costs of keeping those files in Tier 1 storage by \$150,000 each year—a 40 percent reduction.

A “Key” Competitive Advantage

Individuals working directly with the properties are not the only ones at Transwestern who are enjoying a more productive working environment, explains Kim Croley, Director of National Marketing and Communications at Transwestern. “Professionals in sales, marketing, finance, and human resources can get their jobs done faster and more effectively because they have easy access to timely and comprehensive project information through the improved data environment,” she says. “Through TranSource, they have complete

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historical information on each employee's contributions to various assignments and equally rich information on all ongoing assignments. This is an enormous advantage when we are pitching business to new clients."

Kesselman concurs. "For an ongoing assignment, Transwestern can source up-to-the-minute institutional knowledge in a few keystrokes," he says. "For a new assignment, Transwestern can bring precise resources to the table in moments. In our industry, that is a key competitive advantage."

Rapid Development and Deployment

When Transwestern has won new business, its team members can get to work quickly as well. "Instead of having to purchase and install a new file server for every new assignment, we simply set up a OnePlace collaboration site, which takes about 30 minutes," Kesselman says. "Each year on new-project launches, we are saving the time of one full time-equivalent employee—time that we can apply to more lucrative activities."

Some of those activities involve the development of enhancements that will make TranSource and OnePlace even more powerful, such as an enterprise dashboard that includes a business intelligence (BI) component to take even greater advantage of the company's new data management and storage model, and the expansion of UC with the upgrade to Lync 2010. "With UC based on Lync 2010, employees and other team members not only can boost their use of IM—further reducing reliance on email and the costly storage associated with it—but also reduce their use of traditional telephony," Kesselman points out. "This can help us cut telecommunications costs."

In related work, Transwestern is migrating its public-facing website from the content-management platform on which the legacy intranet was based to SharePoint Server 2010, along with several dozen other external-facing sites focused on cities and events. That work is expected to be complete in mid-2011.

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