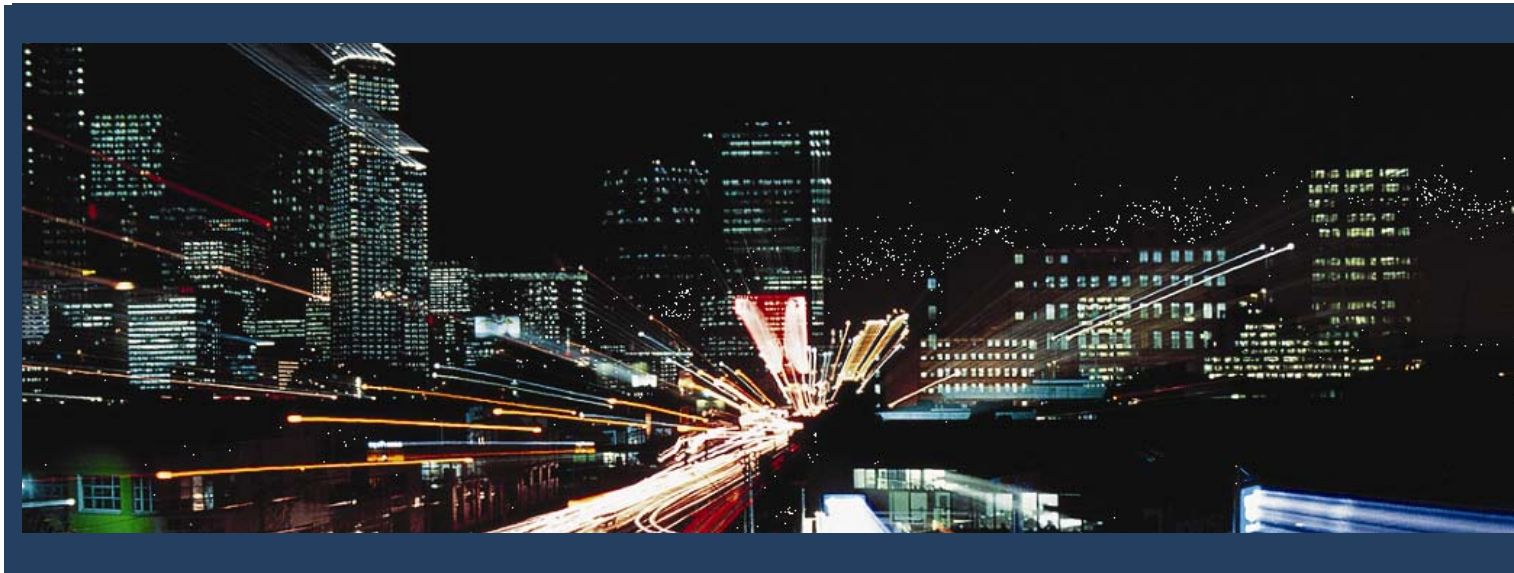


Connect. Exchange. Transform.



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## Defining IWMS: A Fresh Perspective

*Grounding the Discussion  
and Re-Casting the Advancements*



## Table of Contents

Section 1: Introduction .....	1
Section 1.1 – Overview .....	1
Section 2: IWMS – A Fresh Perspective .....	2
Section 2.1 – IWMS Platform Capabilities .....	2
Section 2.2 – IWMS Cross Functional Capabilities .....	3
Section 2.3 – IWMS Functional Capabilities.....	4
Section 3: Influencing Factors .....	6
Section 4: Conclusion .....	7

## Defining IWMS – A Fresh Perspective

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## Section 1: Introduction

### Section 1.1 – Overview

Over the past two years, IWMSconnect has observed a curious debate between IWMS industry leaders over the question of “what is IWMS technology?” Fueling this debate is a confluence of factors which makes reaching definitional consensus a far reaching objective. Specifically,

- IWMS technology, like any other technology, is evolving even as it is evolving and today’s definition is continuously overshadowed by tomorrow’s advancements
- Competing interests and perspectives between IWMS market constituents inhibits the ability to arrive at commonly accepted definition
- Outliers such as enterprise asset management (EAM) and retail sector which do not conform to conventional notions of workplace management
- Some content that the shelf life of the IWMS acronym has passed
- Traditionally authoritative IWMS analyst and research firms are seemingly waffling in their leadership role

Yet, despite these inhibitors, IWMSconnect believes the IWMS marketplace would benefit from a fresh and decisive definitional perspective, if only to help ground the discussion. Particularly, as IWMS technology matures as an enterprise class technology, foregoing a definition for the sake of perpetuating a debate exposes the market’s underlying misalignment. Indeed, the functional and technical advancements achieved over the past 3 – 5 years are far too important to remain ungrounded.

Therefore, the objectives of this white paper are to offer

- A progression point of view of how some of today’s IWMS industry leaders are answering the question of ‘what is IWMS?’
- An innovative framework that characterizes the advancements of IWMS technology over the past 3 – 5 years
- A resource that helps CRE & IT business leaders ‘sell’ IWMS technology to senior leadership and evaluate potential application providers
- A framework for monitoring advancements in IWMS technology as it continues its trajectory as an emerging enterprise technology suite

# Defining IWMS – A Fresh Perspective

## Section 2: IWMS – A Fresh Perspective

Driven by a convergence of supply and demand factors, Integrated Workplace Management System technology has emerged as an enterprise class technology enabling organizations to transform their workplace management function to meet strategic and tactical enterprise objectives by improving the performance (ROI) of physical assets and associated business processes. IWMS applications, packaged as a full suite or as an integrated point solution, are typically characterized by 3 common features:

### Platform Capabilities:

Application architecture standards that accommodates transformative enterprise business objectives:

- ✓ Centralized Application Platform
- ✓ Bi-directional application integration
- ✓ Workflow enablement

### Cross –Functional Capabilities:

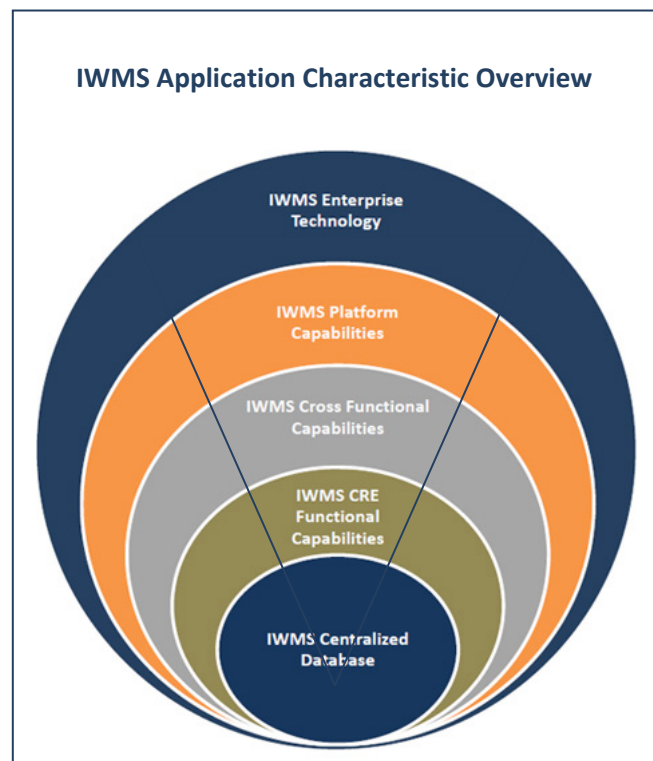
Application functional standards enabling execution of strategic workplace objectives

- ✓ Performance Management
- ✓ Strategic Planning
- ✓ Portfolio Management
- ✓ Environmental Sustainability

### Corporate Real Estate (CRE) Capabilities:

Application functional standards enabling tactical execution of key CRE business processes

- ✓ Transaction and Lease Management
- ✓ Capital Project Management
- ✓ Space and Move Management
- ✓ Facilities and Maintenance Management



## Section 2.1 – IWMS Platform Capabilities

IWMS platform capabilities are generally understood as application architecture standards that serve as the basis for delivering transformative enterprise business objectives:

## Defining IWMS – A Fresh Perspective

- **Centralized Application Platform:** Application architecture standards including hardware, centralized database, operating system, browser plug-ins, application language, system and role based security and system performance and interface which can accommodate modular scalability and user specific application configuration and customization.
- **Functional Workflows:** A common feature across the IWMS suite; workflow tools leverage the applications centralize data warehouse and can be utilized to design and execute specific processes in each of the functional modules. Workflows are typically classified as embedded (off the shelf) or user defined via configuration and / or customization.
- **Integration:** Upstream integration with other enterprise systems such as ERP, CRM, or SCM; via the use of SOAP, XML, or other APIs; the systems can readily import or export data from these other systems; and provide a fairly high degree of interoperability. Downstream with integration with CRE point solutions and custom solutions

### Section 2.2 – IWMS Cross Functional Capabilities

IWMS cross functional capabilities are generally understood as the application functional standards enabling execution of strategic workplace objectives:

- **Performance Management:** Provides a robust set of pre-defined performance indicators that tie to various workplace management functions and corresponding performance indicators. These user-oriented dashboards can report up and down the workplace organization, whether relating to financial management<sup>(1)</sup> or key functional KPI's across the real estate value chain
- **Strategic Planning:** Supports “what if” analysis and scenarios across core CRE functions; i.e., portfolio planning (consolidations, dispositions, acquisitions, sale/leaseback schemes; financing, capital lease financing; NPVs of different leasing schemes etc.), program management forecasting (budgeting, project prioritization, contingency planning etc), space and move management (stacking models, move scenarios etc), facilities management (planned and unplanned maintenance forecasting, resource planning etc)
- **Portfolio Management:** Relates the structure and accessibility of cross functional workplace data which maps to enterprise geographic, organizational, resource, and asset breakdown structures. For example, it tracks a portfolio view of leases and owned property assets (including

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<sup>1</sup> Financial Management is understood as a core function within the performance management function as well as a core capability contained within each core functional capability

## Defining IWMS – A Fresh Perspective

land, buildings, and building components) and critical data such real estate asset costs, market values, rents and lease expirations, taxes, and total commitments over time.

- **Enterprise Sustainability:** Supports environmental sustainability across a broad spectrum of workplace management issues at both asset and process level, including energy conservation, carbon foot print tracking in support of cap and trade requirements hazardous waste tracking and reporting and LEED process and documentation.

### Section 2.3 – IWMS Functional Capabilities

IWMS functional capabilities are generally understood as the application functional standards enabling execution of tactical corporate real estate (CRE) objectives

- **Transaction Management / Lease Management:** Relates to the “deal flow” of a real estate transaction, including market analysis, site search, the generation of RFPs to prospective building owners; deal analysis i.e., analysis of building leasing or purchase proposals, negotiation support by analyzing different deal structures, lease drafting; and deal closing. It also provides summary reports on the status of the entire transaction activity and where each deal stands in the process. Lease management, as a subset of the transaction management module, analyses different leasing structures and provides for parametric NPV analysis by adjusting different variables such as lease term, rental rates, escalation stops, options, work letter and other allowances, abatements, or balloon payments.
- **Program / Project Management:** This functionality supports the activities of facilities related design, construction and management of capital programs and projects. Projects would include leasehold improvement projects, tenant fit-out, new construction, and rehabilitation or building enhancement projects. Functionality at the program level generally includes ability to aggregate multiple projects and conduct program planning and forecasting. At the project level, functionality typically includes scheduling, budget, resource, risk and quality management.
- **Space and Move Management:** Provides a visual portrayal of work spaces within the enterprise building; by enabling bi-directional interoperability between CAD files and space data files. Through various sorting and coding schemes, the user can identify space vacancies, adjacencies, departmental assignments, and individual office and cubicle assignments. The functionality also can support “what if” scenarios by evaluating different blocking and stacking schemes, as well as do drag and drop relocations of staff and equipment from one location to another with a building or campus. Move management, as a sub-set of space management, uses workflow tools to automate much of the move, add, and change process. Floor layouts, room assignments, equipment locations can all be automatically updated via this functionality.

## Defining IWMS – A Fresh Perspective

- **Facilities and Maintenance Management:** Supports the usage, maintenance (planned and unplanned), reliability and operation of work spaces within the enterprise facilities portfolio. Often leveraging employee self service workflows and hand held technologies, it tracks building occupants, space assignments, hoteling and reservations <sup>(2)</sup>, building equipment, furnishings, fixtures, health and environmental safety, building related assets and warranties, and increasingly physical security.

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<sup>(2)</sup> Industry leaders vary in their alignment of the hoteling and reservations IWMS function. Some align within the space and move management function due to its influence on space optimization, while others align with facilities management due to its use of employee self service workflows. For the purpose of this exercise, we have aligned it within the Facilities Management functions

## Defining IWMS – A Fresh Perspective

### Section 3: Influencing Factors

IWMS technology, whether deployed as a fully integrated solution, or on a modular basis, are functionally and technically positioned to deliver on organizational transformative priorities. Yet each vendor, and indeed their service partners, varies in their approach to execution. These variances often have a significant influence on an organizations ability to realize enterprise, strategic workplace and tactical CRE business objectives associated with improving the performance (ROI) of physical assets and associated business processes.

Therefore, looking beyond the traditional approach of defining IWMS technology strictly on the basis of functional and technical capabilities, a series of influencing factors have been add to this IWMS definitional perspective. Specifically:

- **Roadmap Comprehensiveness:** Ability to interpret market trends, customer needs and competitive pressures and successfully translate them into a convincing product direction strategy that can be leveraged to create opportunity for the technology provider
- **Capability to Deliver:** Quality and efficacy of the processes, systems, methods or procedures that enable IT provider performance to deliver on commitments and positively impact revenue, retention and reputation and ultimately, capitalize on their vision
- **Ease of Implementation:** Understood as ability for the end user to realize expected ‘time to value’ benefits, factoring in configuration and customization complexities, application training and overall end-user adoption
- **Industry Adaptability:** Ability to offer specialized out –of –box capabilities that meet the needs of specific industry segments such as retail, federal, financial services, life sciences, utilities, universities and datacenters
- **Best Practice Integration:** Incorporating of leading industry practices and business processes in out-of-the-box applications including workflows, integration, roles, reporting, business object groups, forms, and data fields

## Defining IWMS – A Fresh Perspective

### Section 4: Conclusion

As the debate continues between IWMS industry leaders over the question of “what is IWMS technology”, the definitional perspective outlined in this position paper is intended to provide the IWMS business community with stake in the ground that helps formulate tomorrow’s advancements.

Specifically:

- A progression point of view of how some of today’s IWMS industry leaders are answering the question of ‘what is IWMS’
- An innovative framework that characterizes the advancements of IWMS technology over the past 3 – 5 years
- A resource that helps CRE & IT business leaders ‘sell’ IWMS technology to senior leadership and evaluate potential application providers
- A framework for monitoring advancements in IWMS technology as it continues its trajectory as an emerging enterprise technology suites

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Special Acknowledgement is Extended to our Platinum Research Partners



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### About IWMSconnect

IWMSconnect is the leading source for independent Integrated Workplace Management System (IWMS) business intelligence. Our focus is to help today's CRE and IT business leaders make informed and sustainable IWMS business decision through unfiltered access to leading IWMS research and analysis and the preeminent IWMS peer network.

For more information on IWMSconnect, please visit [www.iwmsconnect.com](http://www.iwmsconnect.com) or contact Daniel O'Toole at [dotoole@iwmsconnect.com](mailto:dotoole@iwmsconnect.com)