The Story Behind the Square Footage: Turning Complex CRE Portfolio Data into Strategic Insights

Confidential Premier Global Financial Services Firm, United States

THE DEMAND

The client, a global financial services firm, came to us with a clear objective: to develop a lease administration dashboard to better visualize their leasing data. While they had been maintaining a detailed record of leasing information, it was all managed through Excel spreadsheets. This had inherent challenges—it was highly manual and time intensive to keep the data clean and up-to-date, it wasn't easily accessible to stakeholders, and it was challenging to cross reference other data for a greater depth of insights. They were seeking a way to elevate insights and storytelling while recapturing precious time.

THE SOLUTION

We partnered with this longstanding client to help them make a critical shift—from time-consuming, manual spreadsheet to a centralized, insight-rich lease data strategy. By aligning their data to the specific questions leadership was asking and building a custom dashboard that automated and visualized critical metrics, we eliminated hours of manual reporting and enabled real-time decision-making. But the impact didn't stop at visualization, we helped them reframe their data as a strategic asset, with structured advisory, repeatable reporting logic, and a clear storytelling framework that brought clarity and credibility to every square foot in their portfolio.

Apex42 transformed this client's processes from manual Excel-based lease tracking to a dynamic lease administration dashboard—streamlining reporting, automating key metrics, and turning raw data into strategic, decision-ready insights. Through a collaborative discovery process and ongoing data advisory, they gained a scalable foundation for confident portfolio planning and future growth.

Relationship Started 2020	**Services Provided** Space Management
Square Footage in Wisp 500,000	Database Development Dashboard Creation Workplace Data Analysis
Headcount 3,300	Automated Data Import Lease Tracking Floor Plan Scenarios Wayfinding Integration
Efficiency Gain 8%	Desk Reservations Single Sign-On

In a global organization, every square foot carries strategic weight—and every lease impacts long-term planning. For this financial services firm, managing over 500,000 square feet across multiple geographies, staying on top of leasing data wasn't just about real estate, it was about preparing for growth, controlling costs, and aligning space with business priorities.

They didn't lack data. They had detailed lease records in Excel, carefully maintained over the years. What they lacked was visibility and clarity. Leaders were asking key questions—about cost, timing, and opportunities—but the answers took hours to assemble and weren't always easy to interpret.

That's when they turned to Apex42.

Building the Blueprint
We began with a discovery workshop—a collaborative session designed to uncover not just "what they wanted to see," but "why they needed to see it." We spent time learning about their wants and needs and compared those to best practices in the industry, ensuring we were creating something sustainable for their continued evolution of the workplace.

To begin creating a streamlined dashboard experience we started with:
- The questions leadership was asking and frequency of the ask
- The data the client already had
- Data gaps and possible sources
- The workarounds they were using
- The hours spent gathering and updating data for information request
- The hours compiling answers to inquiries and creating reports and visualizations
- The ideal future state

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With these insights, our team of experts had a clear vision how to elevate the client's current efforts to-date into a smarter, dynamic dashboard that increased strategic insights and was easier to access, interpret, and act at scale.

With this clear vision in place, our team got to work — bringing together a broader, more dynamic set of insights than what the client originally imagined.

What started as a request for a lease dashboard quickly evolved into something more powerful: a centralized, living view of their portfolio that connected data from multiple, traditionally siloed sources. Our team integrated data from the client's space management platform, Wisp by Apex42, leasing spreadsheets, HR systems, and recruitment requisitions — correlating information that typically never "talks" to each other. For example, seat data isn't typically captured in lease documents, yet it's a critical metric for calculating cost per person or evaluating utilization. We made it possible by matching and mapping lease square footage to seat counts and HR data — turning raw numbers into actionable metrics that leadership could trust.

"The dashboard streamlined the lease management process. It was previously a very manual, time-consuming process to get the data but now it's automatically updated daily."

We built automated logic to streamline the reporting process, eliminating the need for repetitive manual updates. We structured workflows so data would stay current, even as floorplans changed or new seats were added. We didn't just build a dashboard — we engineered a system that could flex and scale as their portfolio evolved, while preserving data accuracy and confidence.

Our team did the heavy lifting behind the scenes so the client could focus on what matters: using the data to tell a clear, confident story. And with every integration and insight, we moved further away from a static lease dashboard — and closer to a real-time portfolio intelligence engine.

Once completed, the client's real-time, never stale, dynamic dashboard included all the key metrics their corporate real estate team and their executive leadership teams needed to make data-driven decisions to support their entire portfolio.

The final dashboard included key metrics such as:
- Square footage by leased vs. owned
- Expiring leases by location and value
- Cost per seat and cost per square foot
- Multi-year lease rollover projections

"I used to spend five hours a month just updating the report and it would take 2-3 hours to verify the information. That doesn't account for adhoc questions. Now I can quickly verify the information and present to the C-Suite with confidence."

Going Beyond the Dashboard

While the client initially came to us asking for a leasing dashboard, what they gained was much deeper, more strategic, and far more transformative. From the beginning, we recognized this project wasn't about building a single report — it was about unlocking a deeper understanding of their real estate portfolio through connected data, expert advisory, and strategic storytelling.

We worked alongside the client's team to go beyond simply visualizing their lease data. We integrated key data sources — including Wisp by Apex42 for space and seat data, HR systems for headcount alignment, and recruitment pipelines for forward-looking needs.

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This created a dynamic foundation that made it possible to answer bigger, more future focused questions, such as: not just what do we lease, but are we using it efficiently, how might growth impact our footprint, and where can we reduce cost or risk over time.

To support this, we:

- **Correlated data across silos:** Lease terms, square footage, and cost data were matched with seat counts and occupancy from their space management platform — creating metrics like cost per seat and utilization by business unit that were previously unavailable.
- **Built automation logic:** We removed the burden of manual data entry by creating automated rules for updates and validation — saving time and reducing errors.
- **Provided advisory on data structure:** Through workshops and working sessions, we helped them rethink how data should be organized to support executive priorities and portfolio decisions.
- **Created a repeatable storytelling framework:** We helped them craft a narrative around their data so they could clearly communicate risk, opportunities, and cost drivers to leadership.

"Previously there was no consistency in how the data was input. Now I know everything is done apples-to-apples and have confidence it's being done correctly in the dashboard."

By aligning metrics to the specific questions the client's executives were asking, we helped transform their reporting process from reactive to proactive. And more importantly, we helped them redefine what reporting could be: not a burden, but a business asset.

This was more than a dashboard — it was a strategy. A real-time, executive-ready lens into the health and performance of their real estate portfolio, built on trusted data and tailored insights, leaving the client with:

- Repeatable dashboard frameworks for future dashboards
- Storytelling frameworks for their CRE data
- Measurable efficiency gains
- More confidence in their data to make decisions
- Clear ROI, stronger executive alignment, and scalable insights
- Ongoing partnership and advisory to evolve their data strategy as need shift

Partnership for the Future of the Workplace

While this project started as a dashboard request — it ended as a deeper partnership around data, process, and strategic clarity. It's a perfect example of how the right partner, like Apex42, can help uncover the story your data needs to tell — and help you get it ready to tell it.