



Creating Structure from Chaos:

A Move, Add, Change Case Story

Confidential Financial Institution, United States

THE DEMAND

Following an acquisition and merger, a confidential financial institution leveraged Wisp by Apex42 to assess their existing real estate portfolio by organizing their plans and inventory data into a centralized view. The assessment leveraged Apex42 to create a stronger space management foundation and clearer visibility into the organization's people, spaces, work styles, and portfolio. **But the workplace kept moving.**

New hires, seating changes, work style updates, and employee churn continued to reshape the portfolio, while lack of formal coordination made it harder for the facilities team to keep workplace data current and understand how space was being used.

The client needed a more reliable way to manage daily move, add, change activity, reduce the burden of manual follow-up, and keep seating, occupancy, and utilization data aligned with the reality of the portfolio. With more accurate workplace data, the organization could make more confident decisions about current space needs, business unit planning, and future portfolio strategy.

THE SOLUTION

Apex42 helped the client bring everyday workplace change into the same system already supporting its space management strategy. Through advisory guidance and workflow configuration, Apex42 connected MAC activity to Wisp through a permissioned process for submitting, reviewing, approving, completing, and maintaining space requests.

The workflow gave hiring managers a clearer way to request space and gave the facilities team a more consistent way to manage updates without relying as heavily on scattered communication or manual reconciliation. By connecting daily movement to the system of record, the client strengthened seating and occupancy accuracy, improved utilization context, and created a more sustainable foundation for portfolio planning.

This case story explores how a confidential financial institution worked with Apex42 to bring structure to the everyday workplace movement happening across its portfolio, transforming informal requests, manual updates, and fragmented coordination into a more reliable move, add, change process in Wisp.

For workplace data to remain useful, it has to keep pace with the movement happening across the organization. [Moves, adds, and changes \(MAC\)](#), including neighborhood adjustments, office reallocations, departmental moves, new employee onboarding, and broader space changes all affect how a workplace is planned, managed, and understood. When those changes are tracked inconsistently, teams lose confidence in the data they rely on to make decisions.

For this financial institution, managing moves, adds, and changes had become increasingly difficult to manage through informal coordination alone. Employees were being hired, reassigned, relocated, and shifted between work styles, with business units spread across multiple floors. Some locations were experiencing real space constraints, while others required greater visibility before long-term planning decisions could be made.

The organization had already taken important steps toward a

Relationship Started
2024

Square Footage in Wisp
~330,000

Headcount
~2,000

Services & Solutions Provided

Space Management
Drag & Drop Icons
Floor Plan Scenarios
Automated Data Import
Lease Tracking
Desk Reservations
Resource Tracking
RE Insights Services
Wayfinding
Single Sign-On

more mature [space management model](#) with Wisp by Apex42. Through the advisory work with the client, Apex42 identified the next opportunity: creating a workflow that could keep the organization's workplace information current as employees, work styles, and space needs changed.

Bringing a Merged Workplace Into Focus

Following a merger and acquisition, the client was not simply combining workplace data from two organizations. It was bringing two workplace environments, two sets of operating habits, and two views of people and space into a more unified model for managing the portfolio.



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That work required more than consolidation. The client needed a clearer way to understand how employees, work styles, business units, neighborhoods, and physical space related to one another across the organization. Through [advisory guidance and implementation support](#), Apex42 helped establish that foundation in Wisp, bringing together the space inventory for both organizations together in a standardized method and overlaying with occupant data, business unit hierarchy, work styles, neighborhoods, permissions, automated imports, utilization reporting, and badge swipe data into a connected and centralized view of the workplace.

That connected view mattered because the client's workplace was not operating from a single, uniform model. Some employees had dedicated seats, others worked in a hybrid model, and others were remote, while shared neighborhoods gave the organization more flexibility in how space could be assigned and used. But with that flexibility came a higher need for precision because each change in assignment, work style, or seating could affect how the organization understood occupancy, availability, and utilization.

As employees shifted between assigned, shared, and bookable spaces, **the client needed more than a strong data foundation. They needed a way to keep that foundation current as the workplace continued to change.** Without that consistency, utilization data was harder to interpret, seating information less reliable, and the organization's view of the workplace would drift from the reality of how space was actually being used.

When Everyday Change Outpaces the Data

The client was managing a steady flow of workplace change, including their moves, adds, and changes, but much of that activity was still being handled through scattered, informal channels. Requests came through emails, quick conversations, drive-bys, floor walks, and manual follow-up. In some cases, employees moved without the system being updated. In others, workstations changed purpose without clear communication back to the facilities team. As a result, the facilities team was often working after the fact to reconcile what had already happened with what the system

showed. Two team members carried much of that effort manually. They placed employees into seats, confirmed seating needs with managers, walked floors, captured changes, and updated information in Wisp. At times, they had to physically compare the floor plan against the workplace to understand what had changed.

The challenge was not that every request was especially complex. It was that each request required context. A seating change could affect assignment accuracy, a workstation change could affect availability, and a neighborhood adjustment could change how utilization was interpreted. Over time, those coordination points created a growing gap between the workplace as it was planned and the workplace as it actually operated.

For a facilities team already responsible for broader workplace and operational priorities, the model was difficult to sustain. Based on Apex42's recommendations, the client needed a more structured way to manage everyday MAC activity and connect those changes back to the space management system already supporting the organization.

For this client, formalizing MAC activity wasn't only about managing requests. It was about protecting accuracy of the workplace data used to make space decisions.

Creating a Process for Everyday Movement

Apex42 recommended and configured a permissioned [move, add, and change workflow](#) in the client's space management software, Wisp, that gave workplace changes a clear entry point, review path, and connection to the client's existing space data. Hiring managers could submit new hire and employee change requests directly through the platform rather than relying on informal communication and manual follow-up.



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Once submitted, each request moved to the client's internal spaces team for review. This gave the facilities team a more reliable way to evaluate what was being requested, determine whether the change could be supported, and move it forward with the appropriate next steps. When a request couldn't be approved, the team could document a denial reason. When it could move forward, the process supported the notifications, approvals, and data updates needed to complete it.

Managers gained a defined path for requesting space, while the facilities team gained a consistent process for receiving, reviewing, and completing requests. Because the workflow was connected to the [floor plans](#), occupant records, permissions, and reporting structure already in Wisp, MAC activity became part of the client's broader space management process rather than a separate operational task.

Apex42 also helped the client coordinate the details that often sit just outside the seating request itself. When a workstation requires specialized equipment, IT support, or another operational dependency, the process could trigger communication to the appropriate team before the request was completed. This reduced separate follow-up and created a more coordinated approach to managing workplace movement.

By formalizing the move, add, change (MAC) activity in Wisp, the client established clearer ownership around how changes were initiated, reviewed, approved, completed, and reflected in the system. Because the workflow changed how managers submitted requests and how facilities teams received and acted on them, Apex42's role extended beyond configuration. The client took a phased approach that included beta testing, manager education, internal communication, and change management before moving toward broader adoption. This preparation helped managers understand the new process while giving facilities teams confidence that it would improve visibility rather than create additional administrative burden.

Capturing new hires, seating changes, work style updates,

vacates, and employee moves through a more consistent process also strengthened the context behind the client's utilization reporting and badge swipe data. Badge data can show activity in a neighborhood, on a floor, or across a business unit, but without current assignment and work style information, the organization may not be able to determine whether space is appropriately assigned, functionally full, under pressure, or ready for future planning.

That visibility became especially important when evaluating business unit placement, shared neighborhoods, utilization patterns, and future space needs. It also positioned the client to support [future restacks, department moves, and portfolio expansion](#) with a stronger understanding of where people were assigned and how demand for space was changing over time.

Every workplace change creates a ripple across assignments, availability, utilization, and planning. A disciplined MAC process ensures those effects are understood, not simply recorded.

A More Reliable Way to Manage Workplace Change

Through Apex42's advisory support and recommendations, the client brought their move, add, change (MAC) activity into Wisp in a way that reflected how workplace change was actually happening across the organization.

What had previously depended on emails, drive-bys, manual floor walks, and individual follow-up became a defined workflow integrated with the organization's broader space management foundation. The client gained a more reliable process for managing new hires, employee changes, work style updates, vacates, and seat assignments while strengthening the accuracy of their workplace information.

maintain that standard as updates occur, ensuring that



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The impact extended beyond a more organized request process. Instead of spending time chasing updates, reconciling floor plans against the physical workplace, and translating scattered requests into system changes after the fact, the facilities team [gained more capacity to focus on higher-value work](#). That included understanding space needs, supporting internal stakeholders, improving data quality, and helping the organization make better use of its workplace portfolio.

For facilities and workplace teams, this distinction matters because a system can store floor plans, occupant records, and utilization information, but the process behind the system determines whether that information remains trustworthy over time.

With Wisp by Apex42 as their [advisory partner](#), this confidential financial institution established a more disciplined way to manage everyday workplace change. The client gained a more efficient MAC process, a stronger foundation for seating and occupancy accuracy, and a clearer view of the portfolio insights needed to support future workplace planning.