

Customer Case Study

CBRE Group, Inc.

CBRE Uses Proliance® Software from Meridian Systems to Create a Standardized Global Project Management System that Helps Improve Service Delivery on Over 5,000 Projects Each Year.

CBRE Group, Inc. (NYSE:CBG), a Fortune 500 and S&P 500 company headquartered in Los Angeles, California, is the world's largest commercial real estate services firm. The company has approximately 31,000 employees (excluding affiliates), and serves real estate owners, investors and occupiers through more than 300 offices worldwide. Among the CBRE Limited service lines is CBRE Project Management, which is a division of CBRE's Global Corporate Services (GCS). CBRE Project Management offers expertise at every stage of corporate facility project management, from early strategic planning and benchmarking, through mid-project design and construction, to final move-in.

In 2010, CBRE reported US\$5.1B in revenues, a transaction value of US\$128.1B in property sales and lease transactions and a management portfolio of 2.0B sq. ft. The company is the first and only commercial real estate services company in the Fortune 500. It was named as Fortune's "Most Admired Companies" in the real estate industry and as a BusinessWeek 50 "best in class" company three years in a row. CBRE is also ranked among the world's leading outsourcing companies on the IAOP's Global Outsourcing 100 and was named U.S. EPA ENERGY STAR Partner of the Year for the fourth year in a row.

CBRE Project Management manages a high volume of projects (5000+ each year) for clients across the globe, using systematic principles and processes, integrated tools and technologies and experienced professionals to ensure that projects are delivered according to scope, schedule and budget. CBRE Project management services include Facility Assessment, Benchmarking Studies, Strategic Facility Planning, Space/ Building Efficiency Analysis, Facility Standards Development, Volume Purchasing Strategies, Lease/Purchase Negotiation, Telephone/Data Management, Interior Build-Out, Build-to-Suit Development, Relocation Management and Furniture, Fixtures and Equipment Management.

As a project management outsourcing firm, CBRE's two high-level deliverables are 1) service delivery of a defined scope of work and 2) proof that the service has been delivered as contracted. While the company owned a mix of software systems, including Prolog® Manager from Meridian Systems, there wasn't a corporate standard for project management. To more easily meet their deliverables, CBRE needed one technology solution that would standardize project management processes and would be accessible by their 2,500 worldwide project managers.



Defining Technology Needs

To support CBRE's corporate and client-specific reporting needs, they needed a solution with a single, centralized database and advanced reporting capabilities. In addition, the solution needed to support flexible, client-specific deployments and provide a strong framework for integrating project data with third-party applications.

"The ability to report across our entire portfolio of projects was important for driving value to our clients," states CBRE Group Program Director, Vince Verrault. "This would allow us to tell our clients how much projects cost in the U.S. or globally, and give them benchmarking data related to their specific project delivery." Client-level reporting was also important for proving CBRE's service delivery and for helping clients with fiscal planning.

An Introduction to Proliance Software

When CBRE purchased Trammel-Crow Company in 2006, the project management firm was introduced to another Meridian solution: Proliance software, which improves capital project and facility performance by streamlining the plan-build-operate lifecycle. Proliance software is built on a Web Services and XML technology platform to create a flexible, extendable and scalable solution that provides secure, Web-based access from any device with an Internet connection.

After learning more about the Meridian solution, CBRE decided to implement Proliance On Demand, the subscription-based, Software-as-a-Service (SaaS) version of Proliance software, as one of their core corporate project management standards. "Proliance was a market leader and available in a Software-as-a-Service model," Verrault recalls, "which was the best distribution model for us." Since Proliance

On Demand is subscription-based, CBRE could scale their number of users up or down depending on project needs to help control user license costs.

Establishing Global Project Management Standards

As one of its global, Web-based project management systems, Proliance on Demand supports the company's current three-point value proposition: their people, process and technology.

After taking the time to develop companywide project management standards and establish a core Proliance configuration template, CBRE is now able to deploy a project-specific version of Proliance On Demand in just six to eight weeks that includes client-based customizations, such as custom reports and third-party integrations. "Proliance allows us to be very repetitive with our best-in-class processes," Verrault says. "Everybody is on the same page, using the same system, delivering the same service."

Verrault notes that CBRE's project managers use Proliance software to create detailed reports with Key Performance Indicators (KPIs) that allow the firm's clients to gauge their performance. "We have a standard suite of seven reports that range from basic operational, status-type reports to very high-level dashboard reports that show how well we're doing across our project portfolio," he says. "We have also developed some pretty unique cash flow and forecasting reports that allow us to apply forecasting curves to current project spans. The Proliance software reporting capabilities are a huge benefit to us."

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*Vince Verrault
Program Director
CBRE Group, Inc.*

Managing Scopes, Schedules, Budgets and Risk

CBRE is using Proliance On Demand to manage project scopes, schedules and budgets. For CBRE's project management staff, Proliance On Demand automates workflow and makes it easier to move from one project team to another. The software has streamlined many project management processes, saving time and giving the company an opportunity to continually improve their processes. "We've had some cases where we've reduced the processing time for certain tasks by 50 percent," Verrault says. For instance, in some cases the company has reduced invoice processing, by Project Administrators, down to a scant six to eight minutes.

The company's Proliance solution has also delivered a proven integration framework that allows CBRE to meet complex client requirements, even when the Meridian solution isn't the project's system of record. In addition to having import-export level integration with the firm's own financial system, Oracle's JD Edwards software, CBRE recently integrated Proliance On Demand with a global technology customer's Oracle Financials database to ensure that purchase orders issued in Oracle matched the project commitments in Proliance. "The ability to integrate Proliance with other solutions allows us to see the entire project picture regardless of what backend system is actually paying the bills," Verrault says.

For CBRE, however, the greatest value of Proliance On Demand relates to risk management. The software gives the firm visibility and control over each project to ensure that all milestones are met. "From a financial point of view," Verrault explains, "we know what our budgeted amount is

and what money is either committed or unpaid. We also have a historical financial record for the project." Proliance software decreases risk for CBRE's clients, too, which has become a valuable factor in the company's business development efforts. "By using a commercial off-the-shelf product rather than proprietary software, transitioning a client's data from our control to theirs is much smoother."

Partnerships Contribute to CBRE's Success

To achieve success with Proliance software, CBRE worked with Meridian and two of the software development firm's partners, and continues to work with all three companies today. Byrne Software Technologies, a consulting and software development firm and Meridian Value Added Reseller (VAR) and Systems Integration (SI) partner, provides annual consulting services. Runding Corporation, a technology firm and Meridian VAR, provides supplemental application support during project-specific implementations on an as-needed basis.

"Meridian has been very supportive of us and has always been available when we needed them," Verrault states. "We also have a phenomenal relationship with Byrne Software and have had excellent service from Runding."

Byrne Software introduced CBRE to time-saving add-on Proliance tools like SmartDocs and QuickApps. "QuickApps sit on the desktop or in a browser and leverage a small subset of functionality," Verrault explains. The applications allow project managers to compress repetitive steps and easily customize project-specific components. Verrault uses project setup as an example. "Since the first 25 steps in a

project setup are very repetitive, and we know what the answers to those questions are, we've programmed those answers in. The remaining steps that are not repetitive - project type, start date, budget template - are manually entered." This capability not only helps get new projects quickly loaded into the Proliance system, but also helps meet the firm's goal of consistency across the board.

Consistent and Repeatable Project Management

Having a consistent and repeatable system for managing projects anywhere in the world allows CBRE to more easily deliver their services and validate that delivery through detailed reports. As the project management firm focuses on increased usability, Verrault has set aggressive targets for improved utilization of Proliance software. "Our direction with this technology is to continue improving our implementation process to achieve greater benefit from the system," he states, "and deliver greater value to our clients."

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