

# HOW TRANSWESTERN MODERNIZED DOCUMENT MANAGEMENT WITH REALTYISHARE TO ENABLE ENTERPRISE- SCALE EFFICIENCY



## The Business Challenge

Transwestern, a leading full-service real estate firm, faced a **technology challenge**: their property management framework was operating on SharePoint 2010, a platform that had reached end-of-life and could no longer support their growing operational needs.

The legacy system prevented them from accessing modern Microsoft 365 features and created limitations for their property management teams. Rather than simply upgrading to an on-premises SharePoint environment, Transwestern recognized the need to fully transition to the cloud.

"The ultimate challenge was that our existing framework was on the 2010 SharePoint environment," explains Jake Smith, Senior Vice President and Director of Asset Services Operations at Transwestern. "We needed to upgrade in order to leverage what we know the [Microsoft] 365 environment can offer out of the gate."

Transwestern sought a solution that could leverage market best practices instead of building from scratch internally, saving valuable internal resources and time.

"There was a clear inflection point where we had to rethink our approach," recalls Jason Moersch, Executive Managing Director of Business Intelligence, Innovation, and Technology. "The answer wasn't another on premises upgrade. It was adopting a modern platform that could grow and adapt with us over time."

## A Solution in Action




Transwestern's decision to partner with REALTYIshare began at Realcomm, where executives encountered the REALTYIshare team. The comprehensive requirements analysis conducted by REALTYIshare proved decisive.

"The pre-engagement really sealed the deal," notes Moersch. "That really helped us get to, 'all right, these guys understand what they're doing.' They've got a product, but they're not just trying to take an off-the-shelf product and throw it at us. They're really making sure it's configured and customized to our needs."



## Implementation Approach

With REALTY|share's solution—branded internally by Transwestern as Prop360—the company employed a methodical rollout strategy:

-  **Testing and pilot phase** with a small group of users
-  **Feedback collection** to identify common challenges and inform training
-  **Full-scale deployment** with comprehensive training program

The most significant change management challenge was transitioning users from traditional folder-based document organization to a tag-based metadata system.

"Using the tags was a whole new concept for our team members, going from the Windows folders to tags in Prop360," explains Joaquin Trejo, Sr. Director, Asset Services Technology at Transwestern. " While it was a change in process, adoption progressed smoothly with training and support."

**The REALTY|share team helped Transwestern overcome this through:**

- ⌚ Extensive training programs and support materials
- ⌚ One-on-one sessions with users who needed additional help
- ⌚ Demonstrating the improved efficiency of tagging versus folders
- ⌚ Patient, iterative approach to behavioral change

## Key Features Deployed

### Unified Platform Integration

Property data from Microsoft Dynamics flows into Prop360 property site homepages, providing users with quick access to key information without navigating multiple systems. The platform serves as a single source of truth and jumping-off hub for many core property-related activities.

### Enhanced Team Visibility

Clear view of property team membership makes it easy to identify when team members need to be added or removed, improving collaboration through increased transparency.

### Streamlined Workflows

Standardized security groups flowing from Microsoft Dynamics to Prop360 enable easier deployment of automated processes across the property portfolio, creating a foundation for future Power Automate integration.

## Realization of Results

### Enabling Task Centralization

One of the most significant benefits emerged when Transwestern centralized numerous key accounting functions through a partnership with an outside consulting firm. The standardized Prop360 platform was instrumental in making this centralization successful.

"Because there is this unified platform, they know exactly where to go to drop files, to retrieve files. Because it's all under the same protocol," explains Smith.

### Enhanced Data Accessibility

**The integration of property data from Microsoft Dynamics has improved operational efficiency with:**

- ⌚ Quick access to key property information
- ⌚ Visibility of property team membership
- ⌚ Single source of truth for all property-related activities
- ⌚ Improved data quality through easier error reporting

### Virtual Centralization

"At a very high level, it enables centralization for a very decentralized process happening out in the field," summarizes Moersch.

This approach reinforces Transwestern's commitment to standardized processes and data management across the portfolio while enabling local property teams to operate effectively in their specific contexts.

## Future Plans for REALTY|share

**The successful REALTY|share implementation has created a solid foundation for Transwestern's future initiatives, including:**

- ⌚ Metadata-driven compliance document management for critical risk-related documents
- ⌚ Enhanced policy enforcement capabilities through document tracking and analysis
- ⌚ Power Automate opportunities for additional workflow automation
- ⌚ Microsoft Teams integration to enhance collaboration

"This was an important step in aligning our document management environment with our broader technology strategy," reflects the team.



## About Transwestern

Transwestern is a preeminent, vertically integrated commercial real estate firm dedicated to serving investors, partners and clients through expertise in investment, development, brokerage and property management. We own, lease and operate \$57 Billion<sup>1</sup> in assets and have completed or commenced development on more than \$9 billion of real estate projects since 2012.

Our experience spans diverse property types, including logistics, multifamily, retail, mixed-use, healthcare, office, data centers, hotel, and life sciences. Across 33 offices nationwide, our team is united by a culture that cultivates agility, mutual trust and high performance.

Learn more at [transwestern.com](https://transwestern.com).

<sup>1</sup>Includes the Transwestern organization and RIA AUM as of June 30, 2025.

## About REALTY|share

REALTY|share is a leading provider of document management solutions tailored for the real estate industry. By utilizing advanced technologies and industry expertise, REALTY|share helps real estate professionals leverage their investment in Microsoft 365, SharePoint and Teams to streamline their operations, improve collaboration, and enhance productivity.

With a commitment to innovation and customer success, REALTY|share is dedicated to transforming the way real estate businesses manage their documents.

For more information, visit [realityshare.net](https://realityshare.net).

## Successful Transition to Internal Management

After approximately two years of partnership and support, Transwestern successfully transitioned to managing Prop360 internally.

"The REALTY|share team did a great job of sticking to our original ask in the beginning that in the long term we want to keep this all internal," shares Trejo.

**The successful knowledge transfer was made possible through:**

- ⦿ Comprehensive documentation provided by REALTY|share
- ⦿ Thorough knowledge transfer throughout the engagement
- ⦿ Extended support period to ensure stability before handoff
- ⦿ Collaborative working relationship that built internal expertise

## Conclusion

**Transwestern's partnership with REALTY|share exemplifies a strategic digital transformation in property management. By moving from SharePoint 2010 to a modern, cloud-based REALTY|share solution, Transwestern has modernized their technology infrastructure, enabled critical operational initiatives, and created a foundation for future innovation and automation.**