



Sharing Workiva with  
**Investment Reporting  
Teams Globally**

**workiva**<sup>®</sup>

**F**rom the time Jessica Martinez joined LaSalle Investment Management, the senior finance executive knew the real estate investment company was committed to having a diverse, flexible workplace and retaining team players who use technology to deliver quality work.

Over the years, [the Chicago-based company's investments in using cloud technology](#) have enabled her to work from home a few days each month. When the COVID-19 pandemic prompted companies around the world to close their offices, Jessica already was prepared to work remotely, including preparing investment fund documents from home using the Workiva connected reporting and compliance platform.

'Both LaSalle and Workiva have been very good at retaining good talent, people who are innovative, resourceful, who utilise technology to improve performance', Jessica said. 'LaSalle is very dedicated to investment in technology and getting things done smarter and in the most efficient way'.

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#### **A new beginning for a new business unit**

When LaSalle launched its LaSalle Global Partner Solutions (GPS) business in 2018, after acquiring a portion of a peer company, the new division shopped around for investment reporting solutions. Rather than continuing to outsource, leaders chose to connect LaSalle GPS teams to the Workiva investment reporting solution.

Jessica traveled to London for about a week to help introduce the LaSalle GPS team there to Workiva. Known within her company as the Workiva 'go-to person', she was able to bring a Microsoft® Word template for

LaSalle-branded reports into the Workiva platform on her own and bring in the report and financial data, so the team could [collaborate in real time](#) in the cloud. There were some initial headwinds, she said, as colleagues who were accustomed to feeding data to an outside vendor to build reports started building their own reports.

But at a global meeting later that spring, around the same time she received her new title as Senior Finance Executive, Jessica presented on using Workiva for a wide variety of uses. "Everyone was pretty excited about it", she said. 'It worked very well in getting

people to welcome the new change because it was a big change for them to accept'.

LaSalle continues to expand the use of Workiva within in the United Kingdom and Singapore with support from Workiva Customer Success Managers.

'The support that the Workiva team has always provided has been top-notch', Jessica said. 'That's something that really stands out to me, especially when we have deadlines and we have audits going on'.



When you're logging into a system like Workiva, it definitely makes you feel better about your work.

—JESSICA MARTINEZ, Senior Finance Executive, LaSalle Investment Management



### Disconnected Challenges

After acquiring a new business unit, the real estate investment firm explored whether to expand the use of Workiva to the new unit for investment reporting rather than outsourcing the work.

### Connected Solution

Workiva for investment reporting.

### Connected Results

- Time-savings
- Significant cost savings from bringing fund reporting for the acquired group in house instead of outsourcing
- Reduced security risks posed by sending files via email

### Why the company chose Workiva

- Successful use of the connected reporting platform within other LaSalle business units for fund reporting, quarterly corporate reports and regulatory filings
- A platform whose capabilities align with company values that support a technology-forward, flexible, diverse workplace
- Responsive customer support
- Efficiency

### Game changers for LaSalle finance and accounting teams

LaSalle will see significant cost savings by no longer outsourcing reports from the acquired business unit. LaSalle is also using other features of the Workiva platform to connect data, people, and processes to reduce risk and create a growing list of reports efficiently.

- Instead of emailing files, colleagues can sign in to the [secure cloud platform](#) to view documents, tag each other with comments or questions and respond within the platform. 'Now more than ever, we're seeing so many scams. Sometimes, it's hard to determine what's real and what's fake. But when you're logging into a system like Workiva, it definitely makes you feel better about your work', Jessica said.



*The support that the Workiva team has always provided has been top-notch.*

—JESSICA MARTINEZ  
Senior Finance Executive, LaSalle Investment Management

- It's easy to [sync data in from Excel®](#) for reporting.
- Colleagues can work together in real time, so everyone always has access to the most recent version of a document. An audit trail and [blacklines](#) allow them to quickly see what has changed. 'We're not having all these versions of one document out there not knowing who did what', Jessica said. "That's been one of the game changers."

The ability to efficiently collaborate and connect with colleagues wherever and whenever by using

Workiva became more noticeable during the coronavirus pandemic for LaSalle, whose accounting team in the Americas feels like a family, Jessica said.

'It is a game changer', she said. 'I think a lot of companies now are seeing that they can still get things done without having to have everyone in the office'.

See what Workiva can do for you. Go to [workiva.com/request-demo](https://workiva.com/request-demo)

The logo for Workiva, featuring the word "workiva" in a lowercase, sans-serif font. The "w" is a light green color, and the "orkiva" is a dark blue color. The letters are bold and modern.

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