

# Purpose Works Finds the Perfect Consultancy Model and Excellent Customer Support with BQE

Purpose Works Consulting, LLC was in the midst of launching their brand-new company. This time around, they wanted to manage their firm a little differently. Tired of wasting time in Excel and using point-based solution software that lacked an easy user-interface, they decided to switch to an all-in-one, consultancy-friendly platform.

The platform they required had to provide intuitive tools to give them the back-office automation they needed, and data driven reporting to help them make more informed decisions for their projects moving forward.

They found the perfect platform for the job in BQE CORE.

## About Purpose Works Consulting LLC

Purpose Works Consulting LLC's mission is to make work more productive, valuable, impactful, and meaningful. The firm focuses on helping their clients increase business performance by changing how work gets done, designing scalable operating models, ensuring the success of critical programs, and more.

Their clients include general managers, executives and program leaders who believe in building their organization's capability and are looking for a partner to guide and support them on their journey.

## Time Wasted on Manual Processes

Purpose Works Consulting spent three months looking for the perfect software to help them streamline operations and create accurate reports.

Their previous company used QuickBooks and Excel for project tracking but found they wasted so much valuable time on manual time entry and constructing reports to share with their team.



### **Purpose Works Consulting LLC**

**Located In:** Summit, New Jersey

**Founded In:** 2021

**Number of Employees:** 6 to 20

**BQE Customer Since:** 2021



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### Time Wasted on Manual Processes (cont.)

They next tried adding Harvest for time tracking.

However, the lack of customer support was frustrating and having to combine Harvest with QuickBooks and Excel led to a muddled process that resulted in numerous errors and added more work to their already full load.

What they needed was an automated all-in-one platform rather than a point-based solution software combined with multiple manual processes.

### The Hunt for a Consultancy Model Platform

When they started their new company, they knew they couldn't continue their previous process of manual data entry. This time they had to do it right with powerful all-in-one software that gave them back time in their day and provided real-time profitability on projects.

The company wanted an affordable, consultancy-friendly platform that could simplify and automate their processes so they could focus on their customers' needs and project delivery.

Key criteria:

- Affordable
- Easy to use
- Fit their purpose
- Ability to have multiple virtual users, and
- Provide real-time profitability on projects

BQE CORE stood out from the competition based on the price for all its combined features, it fit their desired purpose, and BQE had stellar customer service from the moment they requested a free demo.

### Actionable Insights Through Real-Time Reports

The initial difference they saw with BQE CORE was that it was set up for a consultancy model and therefore very easy to hit the ground running.

Their process using BQE CORE included:

- Tracking associate time
- Invoicing clients
- Tracking expenses
- Managing vendor bills/payments
- Using reporting to manage A/P, A/R, reconcile accounts, and manage profitability



*[BQE CORE] helped us streamline our project tracking and maximize remote work across teams*

**Sign Up for a Demo of BQE's CORE to Start Gaining More Hours in Your Day**

**Request Demo**



*BQE CORE stood out from the competition*

## Actionable Insights Through Real-Time Reports (cont.)

The number one way they measured BQE CORE's value was through accurate reporting. Previously, reports were manually built from time tracking results pulled from Harvest and then combined with data from QuickBooks. All of this was then inputted into Excel. Not only did this take up too much of their administrative staff's valuable time, but it also resulted in numerous errors. This meant they had to start all over again to try and discover how the errors were made.

BQE CORE's automated reporting cut out manual calculation giving them hours back in their day. The reporting dashboards were easily customizable to the firm's specific needs and gave them accurate data every time, along with better insights from comprehensive financial and operational data.

Not only did it save time and eliminate errors, but the customizable reports could be easily exported into various formats such as PDFs, Word docs and Excel files to share with the team all with just a simple click of a button.

## Maximizing Remote Work Across Teams

Previously, sharing files and time tracking was a headache for the largely remote team. Always on the go, they needed the ability to track time and look at data on their phones or laptops from any location. BQE CORE's mobility meant they never missed a task or deadline and could submit and approve work no matter where they were located.

"[BQE CORE] has put all of our project data in one usable tool so we can stay on the same page in real-time while working virtually." said Jennifer Rowley, Office Manager of Purpose Works Consulting, LLC.

The team found work to be more efficient once they had all their information in one virtual portal. Data could be accessed at any time, exactly when needed. This meant no longer putting hours of work on hold because valuable information was back at the office. It also provided an excellent real-time snapshot of where they were on projects.

"[BQE CORE] helped us streamline our project tracking and maximize remote work across teams." said Rowley.

## Superior Customer Support from Day One

The team at Purpose Works Consulting was impressed with the attentive customer support at BQE. Before, trying to get assistance with any software was a nightmare. They didn't know who to reach out to and when they did hear back, it could be days, sometimes weeks, later.



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## Superior Customer Support from Day One (cont.)

They were shocked to reach the right person at BQE on their very first try.

BQE CORE's customer support was friendly and knowledgeable. The onboarding was easy thanks to the one-on-one support, so there was never any downtime between switching from software to software.

"The availability and helpful attitude of service is a BIG plus and they have saved us time and frustration on numerous occasions." said Rowley.

If Purpose Works Consulting needed something changed about the software to better fit their needs, BQE worked to implement these changes making them feel valued as a client, which they found incredibly rare when it comes to management platforms.

BQE also offered helpful trainings and webinars so they could learn more about the different features and the best way to use them for their firm. Previously used software could have features they weren't aware of or didn't have the time to self-learn. BQE made it easy to get their full money's worth because they learned how to master every aspect of the software and discovered tips on how to use each feature to better enhance their profitability.

## Connecting to Cloud Feeds

Another favorite feature of BQE CORE was their Cloud Feeds. Cloud Feeds made it easy for the firm to merge their banking into BQE CORE. After working with multiple software, they wanted their new company to start out on the right footing with one platform to make everything easier.

BQE CORE's Cloud Feeds allowed the firm to automatically import their bank and credit card account transactions into the platform. They could easily connect their bank, credit card, and any investment accounts so they could quickly download transactions rather than waste time manually inputting them. They could also create time and expense line items from the Cloud Feeds so they could integrate with their existing A/R and A/P system in BQE CORE.

This helped them save time and eliminate mistakes by automating expense entries and avoiding double entry.



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## BQE CORE for Consulting Firms

BQE CORE gives firms a powerful platform that supplies time and billing, project management, accounting, and more right at your fingertips.

BQE's founders ran successful A/E firms, so they understand what professional firms are looking for in a robust all-in-one platform. BQE's intuitive software supplies actionable insights at every level and project stage that help drive better decisions while being easy to use.

Try a free demo today to see how BQE CORE can give your firm customized reporting, time tracking, and overall project management to improve profitability.



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