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The W2 Group Saves Time and Increases Profit Margins Using BQE CORE

The W2 Group experienced rapid growth in their accounting and financial planning firm and found themselves at an exciting but difficult juncture. For their firm to properly allocate their limited time, they needed deeper insights into which clients and projects were truly profitable.

So far, they found that managing their many projects wasn't always a smooth process, and there was little visibility into how to structure their fixed-fee contracts in the most profitable ways.

With their list of clients growing every day, they knew they needed the right tool to help them get the visibility they needed while managing their many complex projects. The solution: BQE CORE.

About The W2 Group

The W2 Group is an accounting, tax, and financial planning cloud-based firm headquartered in Washington, D.C. Their agile, highly trained staff specializes in working with government contractors, attorneys, and not-for-profit groups, and offer a client experience that's both highly streamlined and incredibly thorough.

Impressive Features and Support from the Beginning

After trying demos of various firm management software such as Deltek and NetSuite, The W2 Group was immediately impressed with BQE CORE's all-in-one dashboard that had all the features they needed in an easy-to-use set up. Plus, the customer support team was very efficient and ensured their team was properly trained in BQE CORE so they could hit the ground running and never miss a moment in their busy workday.

Once they knew BQE CORE was the perfect software for their firm, they signed on.

THE W2 GROUP

The W2 Group

Located In: Upper Marlboro, MD

Founded In: 2009

Number of Employees: 10

BQE Customer Since: 2016

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Email: sales@bqe.com | **Tel:** (866) 945-1595

Quick and Easy Implementation

The W2 Group started by implementing BQE CORE for project management, time and expenses, and billing. According to Founder and Principal Jeff Wilson II, CPA, "The implementation process for BQE CORE was easy. We clicked a button, migrated our data, and we were good to go." Wilson noted that "there wasn't much of a learning curve," and that his staff was eager to use this intuitive system.

What was incredibly beneficial was the ability to merge their data quickly and easily. BQE CORE's data migration system ensured every piece of the firm's data was moved so nothing was lost in the process and they could begin working with everything they needed.

Running an Efficient and Effective Firm

Within days, the firm saw how easy it was to use BQE CORE. It was like night and day to their previous solution that combined manual Excel, QuickBooks, and various point solutions software. Their entire team from executives to project managers to office staff were able to come together and use BQE CORE fluidly. Before they were sending emails and documents to each other and finding it hard to keep track of important information. This caused delays and headaches.

In Wilson's words, the W2 Group "measures the value of BQE CORE not only by quantitative aspects as far as profitability and managing projects, but also by its ease of use"—and he's thrilled with the results. He comments, "BQE CORE has helped us become extremely efficient and effective."

MJ Foster, the W2 Group's staff accountant, adds, "There's definitely a lot of time saved using BQE CORE...It helps you learn how much time you're really spending on a project and how you can better manage it, so you can be more profitable."

The firm finally had the full insight they needed into their projects and clients and they were able to see just how to improve their profitability with BQE CORE—something they never were able to do before.

"BQE CORE gives you peace of mind. You know where your projects are, and where your capital's being deployed, and you can really see profitability." said Wilson.

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

Request Demo

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Staying Connected Through BQE CORE's Mobile Apps

BQE CORE's mobile apps, reports, workflows, and dashboards have proved particularly useful for the firm. They can easily assign work with BQE CORE's to-dos, and employees using its mobile apps are instantly notified wherever they are. Previously, they had to individually contact each remote employee, and if they didn't check their email, they missed important updates and data. BQE CORE kept everyone connected so they received the information they needed in real-time.

Increased Margins with BQE CORE

BQE CORE made it simple to track essential information like gross project profits, work in progress, unbilled clients, and project performance. Thanks to insights like these, the W2 Group has increased their margins and streamlined their project management.

As a result of their satisfaction with BQE CORE, the W2 Group now asks all their clients to implement the software in their own businesses. After all, Wilson remarks, "If you want to become a profitable business and you're running project-based work, you need BQE CORE."

Save Time and Receive Valuable Firm Insights with BQE CORE

Try a free demo today to see how BQE CORE can consolidate your firm's work and provide you with customized reporting, time tracking, easy ePayments, and overall project management to improve profitability.

If you want to become a profitable business and you're running project-based work, you need BQE CORE.

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