



# Case Study

## THE W2 GROUP

### 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 offers a client experience that's both highly streamlined and incredibly thorough.

### BACKGROUND

The W2 Group has experienced rapid growth, and found themselves at an exciting but difficult juncture: In order to properly allocate their limited time, they needed deeper insights into which clients and projects were truly profitable. 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.

### SOLUTION

The W2 Group implemented BQE Core for project management, time and expenses, and billing. According to Founder and Principal Jeff Wilson II, CPA, *"The implementation process for 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.

### BENEFITS

In Wilson's words, the W2 Group *"measures the value of 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, *"Core has helped us become extremely efficient and effective."*

*"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."*

**- JEFF WILSON II, CPA,  
FOUNDER & PRINCIPAL, THE W2 GROUP**

MJ Foster, the W2 Group's staff accountant, adds, *"There's definitely a lot of time saved using 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."*

Core's mobile apps, reports, workflows, and dashboards have proved particularly useful for the company. They can easily assign work with Core's to-dos, and employees using its mobile apps will be instantly notified wherever they are. Meanwhile, it's 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 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 probably need Core."*