The A/E Firm Management Software Buyers Guide

How Engineering & Architecture Leaders Should Evaluate, Compare, and Choose the Right Platform for Growth

Table of Contents

From Chaos to Clarity:
Why the Right Firm Management Software Matters Now

Running an architecture or engineering firm today is more complex than ever. Projects continue to grow in scale and complexity. Collaborative teams include more and more specialists. Clients expect faster delivery and greater transparency. Competition for both new work and top talent intensifies each year. Leaders are asked to maintain design excellence and quality control, while steering a business that demands efficiency and profitability.

Many firms, even large ones, still rely on spreadsheets, QuickBooks, point solutions, or legacy systems to keep the business running. These tools often create disconnected data, duplicate data entry, billing delays, and limited visibility into project performance. In short, they create chaos, not build confidence.

Further, they are often designed for only a few people at your firm, rather than for the entire team to have the tools needed to succeed in their roles. Meanwhile, leadership teams are forced to make decisions without a reliable view of the firm's health.

The impact is clear. Firms experience shrinking margins, stalled growth, and end up with teams that spend too much time on administration rather than on meaningful, billable work. Leaders feel stuck reacting to problems instead of planning with confidence.

A modern firm management platform changes this reality. With the right system, leaders gain real-time visibility into both project and financial performance. They see where resources are going, where profit is made, and where risks are emerging. Teams spend less time on repetitive tasks and more time delivering value to clients. Firm leaders make decisions based on accurate data rather than assumptions.

This Firm Management Software Buyers Guide provides a framework to help you evaluate your options. It is designed for principals, directors, and executives at architecture and engineering firms with 20 to 200 employees. Inside, you will find practical tools such as checklists and worksheets, along with insights shaped by decades of experience working with firms like yours.

The goal of this guide is simple: give you the clarity and confidence to select the platform that will support your growth for years to come.

Meet the Experts

This Buyers Guide was developed by a team of architects, engineers, and business leaders who understand the challenges of running a design firm. The insights you will find here come from real-world practice, combined with decades of experience helping A/E firms succeed.

Lucas Gray, Director of Content & Community
Lucas has more than 20 years of experience practicing architecture, including leading his own firm, and consulting with A/E firms. As Director of Content and Community at BQE, he is focused on helping A/E leaders improve profitability and streamline operations. Lucas is the primary author of this Buyers Guide.

Matt Cooper, Chief Executive Officer
Matt is the CEO of BQE Software and a seasoned leader of global technology organizations. He drives the company's vision to deliver innovative solutions that help architecture and engineering firms operate more efficiently, scale with confidence, and achieve lasting success.

Dan McCormick, Chief Revenue Officer
Dan McCormick has built his career at top AEC software companies, giving him unique insight into the challenges firms face. At BQE, he leverages that expertise to help architecture and engineering firms evaluate their needs and adopt software that improves efficiency, visibility, and growth.

Bryan Zabonick, Vice President of Delivery
Bryan has guided hundreds of firms through the adoption of new business management platforms. With a background in accounting and hailing from a family of engineers, his knowledge of A/E workflows ensures firms not only implement successfully but also achieve lasting results.

Steve McTavish, Senior Vice President of Strategic Accounts
Steve builds our partner network and works with customers to ensure they achieve measurable results with BQE CORE. He brings deep expertise in aligning technology solutions with business strategy and leads initiatives that strengthen long-term client relationships.

Steve Burns, FAIA, Founder and Consultant
Steve is an architect, former firm owner, founder at BQE Software, and founder of The Well-Designed Firm. He has advised thousands of A/E firms on strategy, succession planning, and management. His voice is widely recognized in the industry as a trusted source of knowledge and perspective.

Together this team has worked with thousands of architecture and engineering firms worldwide. The perspective shared in this Buyers Guide is informed by those experiences and designed to help your leadership team make confident, informed decisions about the future of your firm.

The Competitive Software Landscape

The architecture and engineering industry has long been underserved when it comes to firm management software and business tools. Many leaders have struggled with tools that were never designed for the realities of project-based businesses. Others adopted platforms that once felt adequate but have since fallen behind the needs of modern practice. And too many settled for cobbling together multiple point solutions rather than integrated toolbox.

Behind every product is a story. Some were created for accounting first, with project management poorly tacked on later. Others focused on design simplicity but never built out the financial backbone firms need to grow. A few were borrowed from other industries and forced to fit architecture and engineering. Understanding these back stories, and where each solution falls short, is an essential step in choosing the right partner for the future of your firm.

Spreadsheets and QuickBooks

The Story: For decades, spreadsheets and QuickBooks have been the default tools for small firms. They are inexpensive, malleable, easy to start with, and familiar to almost everyone. For many leaders, they represent the path of least resistance when setting up a business. Once custom sheets are in place, switching to other options feels like a major disruption. Even today, a significant percentage of mid-sized firms still rely on these tools, often paired with disconnected point solutions, to manage the business.

Strengths: Low cost, fast to implement, widely understood by staff and accountants, and highly customizable.

Weaknesses: These tools were never designed for professional services firms. They lack live project visibility, forecasting, and integration across functions. As soon as firms grow beyond 10 to 15 employees, leadership teams spend more time reconciling data than managing the business. The result is reactive decision-making and limited insight into profitability.

Manual entry compounds the problem. Every invoice, timesheet, or expense requires staff to manually key in data, which increases errors and consumes valuable time. Even when spreadsheets are carefully built, formulas and links are fragile. A single mistake can ripple across reports, leading to inaccurate forecasts or financials. What seems manageable at a small scale quickly becomes risky and unsustainable as the firm grows.

> **"When critical project and financial data lives in multiple systems, problems go unnoticed until they become expensive. AE firms need visibility in real time, not at month-end."**
>
> **Dan McCormick**
> Chief Revenue Officer

Legacy Systems (Deltek: Ajera, Vision, and Vantagepoint; and Unanet)

The Story: Deltek entered the A/E market in 1998 through the acquisition of Harper & Shuman and its CFMS product, which was later renamed Deltek Advantage and became the foundation for Deltek Vision and, eventually, Vantagepoint. Ajera followed a similar path, joining the Deltek portfolio through the acquisition of Axium. Over time, Deltek built a dominant presence in the market largely through acquisition, consolidating competitors and migrating customers onto its platforms rather than reinventing the underlying technology.

Unanet followed a different but related path. Originally designed for government contractors and professional services automation, it later expanded into the A/E market through acquisition, including Clearview Software, adapting its platform to serve design firms. In both cases, these systems were shaped by their origins and acquisition history, not by being purpose-built from the ground up for modern A/E workflows.

Strengths: These platforms benefit from broad name recognition, long-standing customer bases, and robust accounting capabilities. Many firms adopted them at a time when spreadsheets were the primary alternative, and they remain familiar to finance teams that have used them for years.

Weaknesses: Despite their long presence in the market, these platforms have struggled to keep pace with modern expectations. Interfaces and workflows reflect legacy design decisions, resulting in rigid processes and systems that are difficult for non-financial users to navigate. Because architecture and engineering represent only a portion of their broader customer base, product innovation has tended to be incremental, leaving many firms with tools that feel heavy, complex, and misaligned with how teams work today. Transitions between Deltek products or versions often introduce additional friction, requiring significant retraining and reimplementation efforts that disrupt operations rather than improve them.

Complexity compounds the problem. These systems frequently require dedicated administrators or specialized consultants to manage configurations, build reports, and support ongoing changes. As a result, adoption across project teams and firm leadership is often limited. Instead of serving as a shared operational platform, the software becomes a back-office system controlled by a small group, leaving principals and project managers disconnected from timely, actionable data.

Unanet exhibits many of the same challenges. Originally designed for government contractors, it later entered the A/E market through the acquisition of Clearview and its rebranding as Unanet AE. While

> "Legacy systems gave A/E firms structure when the industry needed it most, but they stopped evolving. Today's leaders need platforms that move faster than the problems they're solving. Systems that connect data, remove friction, and help firms operate with clarity in a more complex world."
>
> **Matt Cooper**
> CEO, BQE

bqe

this expanded its reach, the platform still reflects its government contracting roots. Firms often report steep learning curves, unintuitive reporting, and a reliance on customization to accommodate A/E workflows. This dependence on configuration and consulting increases long-term costs and maintenance effort, while inconsistent interfaces across modules make everyday use more difficult. As with other legacy platforms, the risk is that the system remains functional for accounting teams but fails to gain broad adoption across the firm.

New Entrants (Monograph, Factor AE, and others)

The Story: Over the last decade, several startups have entered the A/E software market with fresh branding and modern interfaces. Tools like Monograph, Factor AE, and other newer entrants have positioned themselves as alternatives to legacy systems, appealing to firms looking for something simpler and more visually intuitive than traditional ERP platforms. Their messaging has resonated most strongly with newer or boutique studios that value clean design and ease of use.

The category is evolving quickly. Factor AE, was recently acquired by Total Synergy, an Australia-based, A/E-focused ERP provider. The acquisition appears to be a move to expand into the U.S. market, though how the two products will converge, coexist, or be integrated over time remains unclear. This kind of consolidation reflects the rapid change and experimentation still underway among newer entrants.

Strengths: These platforms are typically quick to adopt and easy to learn. They emphasize simplicity, offering lightweight project management and time tracking with minimal configuration and no accounting tools. For small firms in the 1–10 person range, they can serve as an accessible starting point before operational complexity increases.

Weaknesses: Beneath the surface, however, these tools often lack the functional depth needed for a firm's next stage of growth. Customization options are minimal or non-existent. Financial management, forecasting, and advanced reporting are limited, and integrations can be shallow or inconsistent. Many firms find themselves outgrowing these systems quickly and facing another disruptive migration in only a few years.

There's also a structural concern. Founder-led startups can offer passion and personality, but they often carry higher business risk. Without the backing of profitable cash flow, private equity or an experienced board, product direction can shift based on the founder's personal preferences rather than long-term customer needs. Development pace may slow as capital tightens, and support or infrastructure investment can suffer. What feels agile at first can become unpredictable when growth demands stability, scalability, and sustained R&D investment. And venture capital investors demand to see growth and revenue and

> "New entrants have raised expectations for usability in A/E software, which is good for the industry. But long-term impact requires more than a clean interface. Firms need financial rigor, reliable forecasting, and the operational depth to grow without disruption. Areas where lightweight tools often fall short."
>
> **Bryan Zabonick**
> VP of Delivery

put pressure on the company which can often be at odds with the needs of customers.

Generic ERP and Project Tools (NetSuite, Asana, Monday.com, BigTime, etc.)

The Story: Some firms consider adapting broad-based ERP or project management systems. These platforms are widely used across industries and often promise robust functionality with extensive integration options.

Strengths: Brand recognition, a wide range of features, and flexibility through integrations. They appeal to leaders who want to standardize on a single, well-known platform.

Weaknesses: These systems are often not built for the project-driven nature of A/E firms. They require heavy customization, lack industry-specific KPIs, and often create more administrative overhead than they save.

Another challenge is imbalance. Many of these tools specialize in one area while leaving major gaps in others. Task management platforms like Asana or Monday excel at scheduling and collaboration but provide little in the way of financial oversight or reporting. On the other end, accounting-first systems like NetSuite may handle the books but fall short on project visibility. Time tracking apps like BigTime don't offer the full suite of tools needed to manage your whole firm. Businesses adopting these solutions end up stitching together multiple products, creating added cost, disconnected data, and complexity rather than a unified system.

Where BQE CORE Fits In This Landscape

BQE CORE was built from a fundamentally different perspective. The company's founders, an architect and an engineer, understood firsthand how disconnected tools, spreadsheets, and outdated systems held firms back. Rather than trying to patch those limitations, they set out to build a platform that unified the business of design, reduced administrative burden, and gave firm leaders a clearer view of performance.

The earlier BQE products, BillQuick and ArchiOffice, served thousands of firms well, but the team recognized that the industry needed more than incremental improvements. Modern firms required better usability, deeper integration across functions, and real-time insight. Instead of falling into the same trap as the legacy systems mentioned above by

> "I see firms spend years bending generic tools to fit their workflows, only to discover they still can't get the project and financial insight they need. The software becomes the bottleneck, and the firm pays the price in wasted time and lost visibility."
>
> **Steve McTavish**
> SVP, Strategic Accounts

updating out of date products, BQE rebuilt everything from the ground up. CORE is the result: a fully modern, cleanly designed, cloud-based platform designed specifically for the way architecture and engineering firms work.

This matters because the A/E software market tends to split into two extremes. Legacy systems offer depth but are rigid and difficult for most staff to adopt. New startups offer attractive design but lack the financial, operational, and reporting capabilities growing firms depend on. CORE occupies the middle ground that leaders actually want. It's a platform with enterprise-level strength paired with intuitive, well-designed workflows that teams will use every day.

CORE is also backed by the resources and stability required to support long-term growth, continuous product development, and world-class customer support. Its direction is shaped by architects, engineers, and firm operators inside BQE who ensure the platform evolves with the realities of practice. The result is software that is robust, modern, and purpose-built. A system designed to replace outdated tools and give firms a foundation for the future.

Key Differentiators

All-in-One Platform
CORE unifies time and expense tracking, project management, billing, accounting, reporting, resource planning, and payroll in one platform. Leaders don't need to stitch together disconnected tools — everything is built into a single system.

Role-Based Design
CORE is designed for everyone in the firm, not just finance teams. Principals get real-time dashboards, project managers track budgets and schedules, staff enter time with ease, and accountants manage financials with accuracy. The interface is intuitive and everyone sees the information their role requires, so adoption is higher across the entire firm.

Modern and Intuitive UI
Unlike legacy systems, CORE was built with usability at the forefront. The interface feels modern, clean, and easy to navigate, which means staff actually use it. Better adoption leads to more accurate data and more reliable insights.

Scalability and Reliability
CORE scales with growing firms. Whether you're opening new offices, expanding project types, or increasing headcount, the platform adapts without major disruption. Firms don't have to rip and replace their system every few years. You simply adopt the modules and tools you need for the phase of growth your firm is at.

> "CORE works because it respects how Architecture and Engineering firms actually operate. It brings structure without rigidity, automation without complexity, and insight without noise. It was built to serve the profession, not the other way around."
>
> **Steve Burns**
> Founder, BQE

Industry-Specific Intelligence

CORE was designed for A/E from the ground up. It comes preloaded with the reports and KPIs that matter most — utilization, realization, net multiplier, backlog, WIP — along with flexible billing models such as hourly, fixed fee, AIA progress billing and multi-phase projects. These aren't add-ons; they're embedded in the system.

Continuous Innovation

CORE is a modern, cloud-based platform that evolves constantly. Updates roll out monthly, and its open API framework gives firms flexibility to integrate with other tools and build powerful automations when needed. With CORE, firms stay ahead instead of falling behind.

Why It Matters

Most platforms force firms to compromise. CORE eliminates that problem by combining robust functionality with an intuitive experience that the entire team can embrace. Plus customizability within reports, templates, and dashboards gives everyone access the information they need to excel in their role without expensive consultants or coding knowledge.

Because every role can work effectively in CORE, adoption is higher across the firm. Principals gain clarity through dashboards and analytics. Project managers track budgets, schedules, and resources. Accountants handle billing and financials with accuracy. Staff enter time and expenses quickly, without friction.

Broad adoption leads to better data. With reliable information flowing in from every level of the organization, leaders can make confident decisions about which projects to pursue, how to allocate resources, when to expand, and how to protect margins. CORE transforms data into a foundation for growth.

> **"Our profit margin has increased by 6 percentage points since we started using CORE. It was pretty low when we first transitioned, and we had some legacy projects that didn't translate well, but we've hit our stride. Now the team understands the widgets, like when they see the green line drop below the yellow line, they know it's time to push billing or follow up on deliverables."**

Gabriel Benroth
Founding Partner, Studio & Information Director
INC Architecture & Design

Learn how CORE Can Boost Your Firm →

bqe

Choosing the Right Tool for Your Firm

Selecting firm management software is one of the most important decisions a firm will make. The right platform streamlines operations, strengthens profitability, and frees staff to focus on billable work. The wrong choice leads to familiar problems: clunky processes, poor visibility, wasted time, and unnecessary costs. To choose well, start with a clear picture of your needs. Many firms face billing delays, cash-flow challenges, and limited insight into project performance. Others rely on systems only a few administrators can manage, leaving principals and project managers disconnected. Manual entry and unreliable data remain common pain points.

It's just as important to look ahead. Growth brings new offices, larger projects, and more complex staffing, which means your platform must solve today's challenges and scale with tomorrow's demands. With that perspective, leaders can evaluate vendors against the criteria that matter most for architecture and engineering firms.

All-in-One Functionality

The strongest platforms bring time and expense tracking, project management, billing, and accounting together in one system. This eliminates the need for multiple tools that don't speak to each other, and gives leadership a single source of truth. Ask yourself what a new firm management platform can replace from your existing tech stack.

Ease of Use and Adoption

Software only creates value if people use it. Modern, intuitive design is essential to ensure adoption across the firm, from staff logging time to principals reviewing dashboards. Broad adoption is what leads to accurate, trustworthy data.

Role-Specific Tools

A system should provide value to every role. Principals need high-level dashboards, project managers need real-time visibility into budgets and schedules, accountants need reliable financial controls, and staff need simple, fast time and expense entry. When everyone finds value, participation increases.

Industry-Specific Intelligence

Architecture and engineering firms have unique needs. KPIs like utilization, realization, backlog, and WIP should come built in, not bolted on. Invoicing options like milestone billing or multi-phase projects should be supported natively, not through workarounds.

Scalability

The right platform will support a 20-person firm today and a 200-person firm tomorrow. Look for software that can handle multiple offices, additional projects, and complexity that comes with scale.

Data and Reporting Flexibility

Beyond dashboards, firms need the ability to customize reports, export data, and drill into details. This ensures leaders get the insights they need without relying on IT or consultants for every change.

Vendor Reliability and Innovation

Buying software means choosing a partner. A strong vendor combines stability with a clear commitment to continuous improvement, ensuring the platform evolves as the industry changes.

Implementation and Support

A successful rollout depends on onboarding, training, and ongoing support. The vendor should have proven processes and resources that minimize disruption and accelerate adoption.

Integration and Openness

Even all-in-one platforms need to connect with other systems. Look for strong APIs and out-of-the-box integrations through tools like Zapier, Microsoft Office, and Google Workspace.

Security and Compliance

Firms are handling sensitive financial and client data. Leaders need to know the platform is secure, compliant with industry standards, and capable of protecting their information as they grow.

Evaluating software against these criteria gives you a clear framework for one of your firm's most important decisions. The goal is to look beyond polished demos and choose a partner that supports the way your firm actually works. By focusing on functionality, adoption, scalability, and long-term reliability, you can cut through the noise and move forward with confidence. This guide is designed to help you make a decision that strengthens your practice today and your future growth.

> **"We bought one of the Legacy systems and started implementation, but four months in we realized it wasn't the right program for us. It was cumbersome and had very little flexibility. That's when we knew it was the wrong fit. Onboarding with CORE was faster and it quickly gave us the visibility to understand every project, every dollar, and every hour so we could make smarter decisions and build a stronger business."**

Clint Harris, P.E.
CEO/President
Corsair Consulting

See CORE in action →

Checklist: Essential Features of Firm Management Software

A modern firm management platform should cover every aspect of running your business in one system. When evaluating your options, use this checklist to ensure it has the essential features your firm needs:

Time & Expense Tracking

- Simple, accurate time entry from web or mobile.
- Multiple input options: manual, stopwatch, weekly, or daily.
- Approval workflows for timesheets & expenses.
- Mobile expense capture with photo receipts.
- Expense policies, categories, and direct project links.
- Real-time sync to billing, payroll, and project budgets.

Project Management

- Centralized project hub with contracts, phases, and subconsultants.
- Gantt charts and visual timelines for scheduling and task tracking.
- Milestones, dependencies, and progress tracking.
- Budget and fee tracking tied directly to contracts.
- Change management tools for scope and fee adjustments.
- Document management integrated at the project level.

Resource Planning

- Forecast staffing, capacity, and workload in real time.
- Align resources with budgets, schedules, and utilization targets.
- Drag-and-drop planning with alerts for over- or under-allocation.
- Compare planned vs. actual utilization to improve forecasting.

Dashboards & Reporting

- Role-based dashboards for principals, project managers, and accountants.
- Real-time visibility into utilization, profitability, backlog, and WIP.
- Drill-down capability from high-level summaries into detailed reports.
- Pre-built and customizable reports for projects, clients, staff, and financials.
- Scheduled reporting and automated email delivery.
- Export options to Excel, PDF, or BI tools.

Accounting & Financials

- Fully integrated general ledger, AR, and AP with project-level accounting.
- Cash flow forecasting and bank reconciliation tools.
- Multi-currency support and tax configuration.
- Real-time financial dashboards with revenue, profit, and margin KPIs.
- Automated journal entries and audit-ready reporting.
- Direct sync to payroll, expenses, and billing modules for a complete financial picture.

Billing & Invoicing

- Flexible billing structures: hourly, fixed fee, phased, percent complete, cost plus, etc.
- Automated and batch invoice generation and recurring schedules.
- E-payment integration and automated payment status updates.
- Customizable invoice templates with branding and reporting fields.
- Retainer management and WIP tracking

CRM & Pipeline Management

- Track leads, pursuits, and proposals from first contact to contract.
- Manage opportunity stages, win probabilities, and pipeline forecasts.
- Convert awarded projects directly into live jobs with full financial context.
- Integrate with email and calendar tools for activity tracking and follow-ups.

Payroll & HR

- Embedded payroll with automated tax calculations and filing.
- Employee onboarding and self-service for payroll and HR tasks.
- Automated direct deposit without manual NACHA file handling.
- Centralized employee profiles with roles, pay rates, and utilization.
- PTO, sick leave, and overtime tracking.

Support & Implementation

- Dedicated implementation specialists for onboarding and data migration.
- Structured rollout plans customized for firm size and complexity.
- Extensive knowledge base, video tutorials, and in-app in-app contextual help center.
- Live and on-demand training sessions for continuous learning.
- Customer success team monitoring adoption and satisfaction over time.
- 24/7/365 phone, chat, and email support.

Security & Administration

- Role-based and record-level permissions with audit trails across modules.
- SOC 2 compliance, GDPR-aligned controls, and data encryption.
- Single Sign-on (SSO) authentication with leading identity providers
- Granular workspace and multi-office administration controls.
- Automatic backups and secure data hosting with 99.9% uptime.
- Secure access with MFA support.

Integrations & API

- Open API for custom workflows and integrations.
- Pre-built connections with major payment, accounting, and productivity tools.
- Webhooks for real-time synchronization with external apps.
- Flexible import/export utilities for legacy data and external reporting.
- Cloud-based, remote access and mobile access from anywhere for distributed teams.
- Full-featured iOS and Android apps that include time, expenses, approvals, CRM, PM, and accounting functionality.

> "There's so many great tools, but by far the biggest thing to me is the reporting capabilities. I can pull together a summary of billings or project hours in seconds. What used to take hours now takes minutes. CORE allows me to track where time is being spent, so I can stay involved in projects at a higher level. I'm not just a principal in name. I still get to design and engage with clients, instead of spending 10% of my week tracking numbers."

Warren Lloyd, AIA
Founding Partner
Lloyd Architects

LEARN HOW CORE CHECKS ALL THE BOXES →

bqe

Comparing Your Options

By now, you've mapped out your firm's needs, identified the key criteria that matter most, and you have a checklist in hand to help you review the essential features any platform should deliver. The next step is comparing your options in a structured, objective way.

Too often, software decisions are driven by the flashiest demo or the lowest upfront cost. Both can be misleading. A polished demo may not reflect the daily needs of your team, and low pricing often hides long-term expenses through add-ons, upgrades, or limited functionality that forces future migrations. In many cases, higher-priced, more complete platforms deliver far greater value and a stronger return on investment because they reduce inefficiency, improve visibility, and support the entire firm as it grows. To make a confident decision, you need a methodical approach that goes beyond first impressions.

Start by creating a short list of vendors that appear to align with your firm's size, project mix, and growth goals. Then evaluate each option against the criteria outlined earlier: all-in-one functionality, usability, role-based tools, scalability, industry-specific intelligence, vendor reliability, and support. Assign weights to the factors that matter most for your firm. For example, scalability if you're planning to grow, or ease of use if adoption has been a struggle in the past.

As you compare vendors, test for depth as well as breadth. Does the platform truly integrate billing, accounting, and project management, or are modules loosely connected? Does the interface encourage adoption by project managers and staff, or does it feel like a tool only administrators will use? Does the vendor have a history of steady innovation, or are you buying into a system that will look the same five years from now? These questions separate platforms that look good on paper from those that genuinely support your firm's long-term success.

The most effective way to compare options is side by side. Use a scoring worksheet or evaluation grid to rate vendors against the criteria and features we've outlined. Involve leaders across finance, operations, and project management in the process. This ensures you capture the perspectives of everyone who will depend on the platform and creates stronger buy-in for the final decision.

The goal of comparison is to find the platform that best fits the way your firm operates. When you evaluate vendors with discipline and consistency, you avoid distractions and gain clarity. The result is a decision your leadership team can stand behind, confident that the platform you select will serve as a foundation for growth, efficiency, and profitability.

> **"Great software decisions come from clarity. Define how your firm works, evaluate each platform against real workflows, and focus on long-term value rather than short-term impressions or cost. The best option for your unique business will become clear."**
>
> **Matt Cooper**
> CEO, BQE

Firm Management Software Comparison Worksheet

Choosing firm management software without a structured framework increases the risk of bias, misalignment, and costly rework down the road. This worksheet is designed to help you evaluate options with discipline and clarity. By defining clear criteria, applying weights based on your priorities, and scoring each platform consistently, you can separate marketing claims from real capability. Use it to align leadership, finance, and project teams around a shared evaluation process and document the rationale behind your decision. The interactive worksheet is available as a free download, giving you a practical tool to guide research, support internal discussions, and move forward with confidence.

Criteria / Feature	Weight (1–5)	BQE CORE Score	BQE CORE Score Weighted	Vendor B Score	Vendor B Score Weighted	Vendor C Score	Vendor C Score Weighted	Scoring Guide: How to Rate Each Criterion (1–5)
Purpose Built For A/E	1		0		0		0	1 – Generic software adapted for A/E through configuration or workarounds. 3 – Partially designed for A/E, but influenced by another industry or legacy architecture. 5 – Designed specifically for architecture and engineering firms, with native A/E workflows and metrics.
Web-based, no desktop software required	3		0		0		0	1 – Requires local desktop installs or on-premise software. 3 – Hybrid model with some web access but key features tied to desktop tools. 5 – Fully web-based, cloud-native platform accessible anywhere.
Time & Expense Tracking	4		0		0		0	1 – Basic time entry with limited approvals or project linkage. 3 – Supports time and expense tracking with moderate configuration. 5 – Flexible, intuitive time and expense tracking fully integrated with projects, billing, and payroll.
Resource Planning	5		0		0		0	1 – No true resource planning or forecasting tools. 3 – Basic capacity planning disconnected from budgets or schedules. 5 – Integrated resource planning tied directly to project budgets, schedules, and utilization targets.
Project Scheduling	5		0		0		0	1 – Limited or manual scheduling tools. 3 – Supports milestones and timelines but lacks financial or resource integration. 5 – Visual scheduling with Gantt charts, dependencies, and real-time alignment with budgets and staffing.
E-Payments	4		0		0		0	1 – No native e-payment capabilities. 3 – Supports e-payments through third-party tools or partial integration. 5 – Fully integrated e-payments with automated reconciliation and real-time payment status.
Real-time Financial Dashboards	3		0		0		0	1 – Static reports or delayed financial visibility. 3 – Dashboards exist but require manual refresh or limited customization. 5 – Live, role-based dashboards with drill-down into project and financial data.
Automated Workflow Tools	2		0		0		0	1 – Manual processes for approvals and handoffs. 3 – Some automation, but workflows require customization or manual intervention. 5 – Built-in automation for time, expense, billing, approvals, and notifications.
API-First Platform Architecture	2		0		0		0	1 – Closed system with limited or no API access. 3 – APIs exist but are limited in scope or functionality. 5 – API-first architecture with robust documentation and real-time data exchange.
Mobile App with full functionality	2		0		0		0	1 – No mobile app or severely limited features. 3 – Mobile app supports basic tasks like time entry only. 5 – Full-featured mobile apps for time, expenses, approvals, dashboards, and project visibility.
Built-In CRM	4		0		0		0	1 – No CRM or heavy reliance on external tools. 3 – Basic CRM features with limited integration to projects or in a separate interface. 5 – Fully integrated CRM connecting leads, proposals, projects, and revenue tracking.
Accounting: General Ledger & Project Accounting	4		0		0		0	1 – Limited accounting capabilities or reliance on third-party systems. 3 – Strong accounting features but loosely connected to project data. 5 – Fully integrated GL and project accounting with real-time financial visibility.
Payroll	3		0		0		0	1 – Payroll handled entirely outside the platform. 3 – Payroll integration exists but requires manual reconciliation. 5 – Native payroll fully connected to time tracking, projects, and compliance.
24/7/365 Phone Support	4		0		0		0	1 – Limited support hours, only AI chatbots, or ticket-only support. 3 – Extended support hours with phone or live help. 5 – 24/7/365 phone support with knowledgeable A/E focused specialists.
Total Score	—		0		0		0	

Track How Each Platform Measures Up for Your Firm

The right platform depends on your needs. Use this worksheet to evaluate each option through the lens of your firm's priorities, processes, and growth plans.

Download the Software Comparison Worksheet →

bqe

The Business Case for Modernizing Your Firm Management Software

Every year that a firm delays updating its systems, the cost of inefficiency and lost opportunity compounds. In architecture and engineering firms, people are by far the largest expense, while software represents only a fraction of total costs. Yet better software can make your most valuable resource, your team, dramatically more effective. Investing in tools that make your most expensive resource more effective, is some of the best money you can spend.

According to the 2025 BQE Benchmarking Report, the average net revenue per full-time equivalent (FTE) is $171,612 for engineering firms and $170,478 for architecture firms. If just 5% of an employee's time is consumed by manual tasks such as chasing spreadsheets, reconciling data, or performing manual tasks, that represents over $8,500 per employee per year in lost productivity and capacity.. Compare that to the cost of modern firm management software, perhaps $600/year, and the return is obvious.

Industry benchmarks show that salaries account for 40–60% of total firm expenses, depending on firm size and location. By contrast, software typically falls in the 2–6% range, and business management software itself is usually under 1% of total operating expenses. Against the high cost of employing skilled professionals, the investment in a modern platform is negligible. Especially when the result is higher productivity, faster billing, better cashflow, increased profit, and more accurate insight across the business.

1. Reclaim high-value time

Modern, integrated software minimizes manual entry, duplicate effort, and spreadsheet reconciliation. That time goes back to billable work, client relationships, business development, and quality control. Metrics in the 2025 BQE Benchmarking Reports highlight the performance lift that comes from tighter realization, higher utilization, and better revenue per employee when firms standardize on strong operational systems. Using your firm's net revenue per FTE, you can calculate the ROI: even a modest 5% time recovery per person compounds into meaningful dollars over the year.

2. Accelerate billing and stabilize cash flow

Slow invoicing and long collection periods directly weaken a firm's cash position. According to Deltek's 2025 Clarity Study, firms wait an

Based on recent studies, architecture firms that use all-in-one firm management software like BQE CORE saw an increase of about $13,000 in revenue per employee compared to the industry average. That's a 9% increase in revenue.

Data from the 2024 BQE Benchmarking Report and the 2024 AIA Firm Survey Report.

average of 73 days to collect payment. In contrast, data from the BQE Engineering Benchmarking Report, looking exclusively at CORE users, shows an average of just 57 days, a 22% improvement. Meanwhile, within BQE CORE's user base, firms that offer ePayments have achieved additional reductions of more than 12% in their collection periods. That means stronger liquidity, less debt reliance, and fewer hours spent chasing payments. When your billing process is fast, disciplined, and data-driven, your firm becomes more resilient, and your cash stays where it belongs: in your business.

3. Improve decision quality with unified data

Leaders make better calls when project and financial data live in one system and update in real time. Industry research notes that limited real time visibility into project performance metrics holds firms back from proactive decision making. Consistent, accurate data helps you spot margin erosion earlier, price with confidence, and allocate resources with clarity. Without it, you are looking backwards instead of forward.

4. Reduce errors, rework, and hidden overhead

Spreadsheets and stitched-together tools break in subtle ways. A fragile formula can distort a forecast for months. Integrated platforms remove many of those failure points by keeping actuals, budgets, and invoices consistent across project and accounting workflows. The result is fewer corrections, fewer write-downs, and fewer surprises at month-end.

5. Scale without disruption

Growth brings more projects, more offices, more reporting. A modern platform scales with you, rather than forcing a system change (or a new spreadsheet) every time you hit a new stage. The payoff shows up in steadier utilization, cleaner backlogs, and leaders who can manage more work with the same headcount.

6. Strengthen adoption and culture

When the software is intuitive, more of your team uses it every day. Adoption improves data quality, and better data improves decisions, which reinforces adoption. Industry talent research from the Engineering Management Institute highlights how much workflow effectiveness and flexibility matter to retention and performance. The best systems support those expectations rather than getting in the way. And talent stays at firms with modern operations platforms longer.

7. The cost case is straightforward

Personnel dominate A/E firm expenses, while software sits in a much smaller band. Industry benchmarking from Zweig Group highlights rising EBITDA on net service revenue alongside strong productivity indicators, aligning with firms investing in operational excellence. Against the cost of staff time, the outlay for a unified platform is modest, and the return shows up in faster billing, better utilization, higher realization, and more reliable margins.

Deltek's 2025 Clarity Study reports an average collection period of 73 days. BQE's Engineering Benchmarking Report shows CORE users average 57 days, which is about 22% faster. CORE firms that enable ePayments cut their collection period by another 12% or more.

Data pulled from the 2025 BQE Engineering Benchmarking Report and the 2025 Deltek Clarity Study.

How to Calculate Your Potential ROI

Modern software decisions are best made with numbers, not anecdotes. Once you understand where time, cash flow, and data quality are lost, it's straightforward to calculate the financial impact of improvement. These steps will help you model the return on investing in a firm management platform:

1. Quantify the value of time saved

- Start with your firm's net revenue per full-time equivalent (FTE).
  (If you are unsure of your exact Revenue/FTE, use $170,000 based on results from the 2025 BQE Benchmarking Reports.)

- Estimate what percentage of time is lost each week to manual processes, like reporting, scheduling, or data entry, that could be saved with better software and automations.
  (Saving 1 hour is about a 2.5% improvement for full time employee.)

Calculation:

- Net revenue per FTE × percentage of time recovered × billable staff count = annual time value gained.

- e.g.: $170,000 × 5% × 25 billable staff = $212,500 in recovered value/year

2. Model the value of cash-flow improvement

- Use your current Days Sales Outstanding (DSO) from accounting reports.
  (The Zweig Group's 2025 Financial Performance Report cites a median of 76 days across A/E firms. BQE CORE customers average about 57 days.)

- Estimate how much you can realistically reduce that through faster billing, cleaner invoices, and automated approval cycles
  (About 20% based on BQE data compared to industry benchmarking studies, and if you enable e-payments you can estimate another 12%+, resulting in reduced AR collection effort and lower financing costs.)

Calculation:

- (Annual net revenue ÷ 365) × days reduced × cost of capital = working capital freed.

- e.g.: $5,000,000 ÷ 365 × 10 days × 6% = $8,219 in annual financing savings

The financial return from modernizing is clear. Even small gains in time saved, faster billing, and reduced overhead produce measurable financial gain. Yet the real value extends further: unified systems provide reliable data, better decisions, and more organized operations. Teams collaborate more smoothly, employees feel supported, and clients gain confidence in your professionalism. When your people have tools that remove friction and surface insight, the entire firm benefits, from stronger margins to higher morale and lasting trust.

> **"When firms finally measure the cost of inefficiency, they're shocked by how much value is hiding in plain sight. Reduce friction in your workflows, accelerate billing, and the return on investment takes care of itself."**
>
> **Dan McCormick**
> CRO, BQE

Firm Management Software ROI Calculator

A clear ROI strengthens every software decision. The calculator below takes the framework from the previous page and does the heavy lifting for you. Instead of estimating gains or mapping assumptions by hand, you can plug in your firm's data and instantly see the financial impact of modernizing your systems. Use this tool to model time savings, billing improvements, and cash-flow gains which will illuminate a compelling business case for your leadership team.

Metric	Value		Unit / Note	Equation/Notes
Number of Billable Employees (FTEs)		30	*Full time employees*	*Prorate part-time staff*
Average Net Revenue per FTE	$	171,612	*USD*	*Net Operating Revenue / Total FTE*
Average Expense per FTE	$	114,371	*USD*	*Net Operating Exenses / Total FTE*
Utilization Rate across the firm		65%	*% of total time that is billable*	*Billable Hours / Total Hours*
Time recovered (billable roles)		2.5%	*Percent*	*2.5% = 1 hours saved per week*
Effective Billing Rate	$	126.93	*USD/hour*	*Equation: $171,612 / (2080 * Utilization Rate)*
Effective Cost Rate	$	84.59	*USD/hour*	*Equation: $171,612 / (2080 * Utilization Rate)*
Admin hours reduced per Billable FTE		52	*Hours*	*2080 hours * Time Recovered Percentage*
Non billbale hours saved for the firm		1560	*hours/year*	*FTE * Admin Time Saved*
Increase Billing Potential	$	198,013.85	*USD/year*	*Non-billable time saved * Effective Billing Rate*
Increase Profit Potential	$	**66,047.31**	*USD/year*	*Hours Reduced * FTE * (Effective Billing Rate - Effective Cost Rate)*
Days Sales Outstanding (DSO) Reduction		10	*Days*	*Reduction in the days to payment received*
Cost of Capital		6%	*Interest Rate*	*Enter the interest rate on a line of credit or other business loan*
Improved Cash Flow Value	$	**8,463.06**	*USD/year*	*(Annual net revenue ÷ 365) × days reduced × cost of capital*
Costs	**Amount**		**Unit / Note**	
Annual subscription per user	$	600	*USD/user/year*	*Enter the annual software subscription cost per user*
Implementation Cost (One Time)	$	3,000	*USD (Single Time Expense)*	*Enter the cost of implementation services*
Amortization Period (for Implementation)		6	*Years*	*Enter the number of years you will spread the implementation cost over*
Total Cost	$	**18,500.00**	*USD/year*	*(Annual Subscription cost * FTE) + (Implementation Cost / Amortization Years)*
ROI	$	**56,010**	*USD/Year*	*Increased Profit Potential + Improved Cash Flow - Cost of Software*
		257%	*Percent Return on Investment*	*(Revenue From Investment - Cost of Investment) / Cost of Investment*
Payback Period		**102**	*Days*	*Cost / Revenue * 365*

Move Beyond Sample Data

The screenshot illustrates how the model works. Download the calculator to run precise ROI projections tailored to your firm's financial data.

Download the Free Calculator →

bqe

Why BQE CORE Checks all of the Boxes

By this point in your evaluation, one pattern should be clear: firms performing at the highest level share a common trait, they've modernized their operations with platforms that unify data, automate workflows, and align teams. Among the limited number of solutions purpose-built for architecture and engineering, BQE CORE stands apart. It was founded by an architect and an engineer who understood the frustration of juggling multiple disconnected systems. They built CORE to solve that problem from the ground up.

Where many platforms evolved through acquisitions or incremental updates, BQE made the decision to start fresh — building a fully modern, cloud-based platform designed for the way firms operate today. CORE was developed to replace outdated tools and eliminate the inefficiencies those tools create: siloed data, manual processes, and slow decision-making. It delivers the capabilities firms need to manage projects, people, and profitability in one place.

Built Specifically for A/E Firms

CORE is not a general-purpose ERP or an accounting tool repurposed for the design industry. Every feature, from time tracking and project planning to billing, accounting, and analytics, reflects how architecture and engineering firms actually work. That means firms can stop forcing generic systems to fit their workflows and instead use software that already speaks their language.

This industry focus also shapes the platform's evolution. BQE's roadmap is driven by continuous input from thousands of A/E firms worldwide, ensuring updates reflect the realities of project-based businesses, not the priorities of unrelated sectors or pressure from VC investors.

Comprehensive, All-in-One Platform

CORE brings every major business function under one roof: project management, time and expense tracking, billing, accounting, HR, payroll, CRM, document management, and reporting. This minimizes data silos, reduces the number of subscriptions in your software stack, and eliminates the need for third-party connectors or multiple logins.

- Principals see firm health in real time through dashboards and KPIs.
- Project managers plan schedules, budgets, and resources without leaving the platform.
- Accountants handle invoicing, reconciliation, and payroll seamlessly.
- Staff record time and expenses with minimal friction.

Because every user works within the same system, firms gain a single source of truth and a unified view of operations that drives faster, better decisions.

> **I've talked to so many firms that tell me the same thing after adopting CORE: 'Our performance is stronger across the board.' Billing gets cleaner, project insight gets sharper, and leaders feel more in control. A unified system just changes the way a firm runs."**
>
> **Matt Copper**
> CEO, BQE

Designed for Usability and Adoption

The best software is the one your team will actually use. BQE CORE was built with adoption in mind. Its clean, modern interface allows users to navigate intuitively without deep training. Dashboards are role-based and customizable, showing each person exactly what they need to manage, from simple time-tracking and daily tasks, to project accounting and firm-wide performance metrics.

This ease of use drives higher engagement across all levels of the firm. Project managers, architects, engineers, firm leaders and accountants share one workspace with integrated data, closing the gap between project delivery and financial management. The result is more accurate data, faster reporting, and stronger collaboration.

Proven Scalability and Reliability

Whether you're a 10-person design studio or a 500-person engineering firm, CORE scales seamlessly. Its cloud architecture supports multi-office operations, complex organizational structures, and multi-currency environments. As your firm grows, CORE grows with you, without costly reimplementation or system migrations.

BQE's 25+ years of experience supporting professional services firms means you're not betting on a startup. The company's customer base includes well over 3,000 A/E firms and spans over 60 countries, supported by a 24/7 in-house service team. Implementation specialists help firms onboard quickly and configure the system to fit their processes, not the other way around.

Data-Driven Decisions, Simplified

CORE's reporting and analytics tools turn firm data into insight. Interactive dashboards highlight profitability, utilization, WIP, backlog, cash flow trends, and more — metrics that leaders rely on to make confident decisions. Reports can be automated, scheduled, or customized, ensuring the right data reaches the right people at the right time.

Because financials, projects, and operations live in one system, there's no lag between activity and analysis. Leaders can spot risks early, evaluate performance instantly, and plan with confidence, all without exporting to spreadsheets.

A Track Record of Continuous Innovation

CORE's development is ongoing and customer-informed. BQE reinvests heavily in R&D, guided by feedback from its user community and industry experts. Recent innovations include mobile enhancements, integrated payroll, AI-assisted reporting, and predictive resource planning and analytics that help firms anticipate, not just react.

This pace of evolution means that adopting CORE is not a one-time upgrade, but a partnership for long-term success. Firms that adopt CORE today

are investing in a platform that will continue to grow with the industry, incorporating new technologies and best practices as they emerge. And the BQE CORE team is invested in the success of your business over the long-haul.

Supported by Experts Who Understand Your Work

Behind the technology is a team of industry veterans — architects, engineers, and firm leaders who understand the challenges you face firsthand. Their experience guides BQE's software development team, ensuring every feature and update reflects the realities of running a professional practice. This combination of technical expertise and industry insight enables BQE to deliver not only powerful software, but also the support and guidance firms need to succeed. The company's culture is built around one goal: empowering professionals to focus on their craft while managing their business with clarity and confidence.

The Logical Choice

By every measure—capability, usability, scalability, and support—BQE CORE checks the boxes that matter most. It delivers the financial return of modernization while giving your firm the visibility, efficiency, and confidence to thrive. When leaders see performance clearly, teams use better tools, and data stays consistent, profitability follows. CORE isn't just the best system for managing your firm today; it's the foundation for the firm you want to build tomorrow.

> **"The information we get out of BQE CORE has completely changed the way we run the business. Projects that used to hover between –10 percent and +5 percent profit are now delivering over 10 percent because we can see what's happening in real time, manage our risk, and make better decisions. That clarity is what's driving our performance."**

Madhu Narayanasamy
Vice President
RRP Consulting Engineers

LEARN HOW CORE CHECKS ALL THE BOXES →

bqe

Action Plan: Your Next Steps

Throughout this guide, you've seen how the right firm management platform transforms operations, improving efficiency and long-term profitability. You've explored the software landscape, defined your selection criteria, and calculated the return a modern system can deliver. And hopefully you've seen how CORE is a great option for your business. Now it's time to turn insight into action.

1. Define your goals and priorities

Clarify what success looks like for your firm. Is it improving cash flow, boosting utilization, shortening billing cycles, or gaining better visibility into project performance? Setting measurable goals will help you evaluate solutions objectively and focus your team's attention where it matters most.

2. Build your internal evaluation team

Include decision-makers from across the firm — leadership, finance, operations, and project management. A cross-functional team ensures all perspectives are represented and drives higher adoption later. Assign a single point of contact to coordinate demos and vendor discussions.

3. Use the free evaluation worksheet and ROI calculator tools

Download the Selection Criteria Worksheet and ROI Calculator from this guide. They provide a structured framework for comparing vendors, quantifying efficiency gains, and determining payback timelines. Use your own firm's data to calculate potential returns — even conservative assumptions make a compelling case for modernization.

4. Schedule a tailored demo

Once you've narrowed your shortlist, request a demo that reflects your real workflows. Communicate your pain points, provide sample project data, billing structures, workflows, and reports. Ask each vendor to show how their system handles your most common challenges, not just a generic presentation.

5. Plan for change

Modernization doesn't happen overnight, but with a structured rollout, training, and the right support, adoption happens quickly. Establish early success metrics such as system login rates, invoice turnaround time, reduction in days to collect payment, and accuracy of project reporting. Recognize quick wins to build momentum and reinforce cultural buy-in.

Move Forward with Confidence

Investing in better software builds a firm that runs smoothly, predictably, and profitably. Every hour spent fixing spreadsheets or reconciling data is time lost to design, engineering, and client relationships. Taking a deliberate approach to selection and implementation lays the foundation for your next stage of growth. Use the tools in this guide to evaluate your options, model your ROI, and start your modernization journey.

For firms exploring modern solutions, a personalized BQE CORE demo shows how an all-in-one platform can streamline projects, financials, and reporting, built specifically built for how architects and engineers work.

Schedule a tailored walkthrough and see how BQE CORE can help your firm work smarter, grow faster, and lead with confidence.
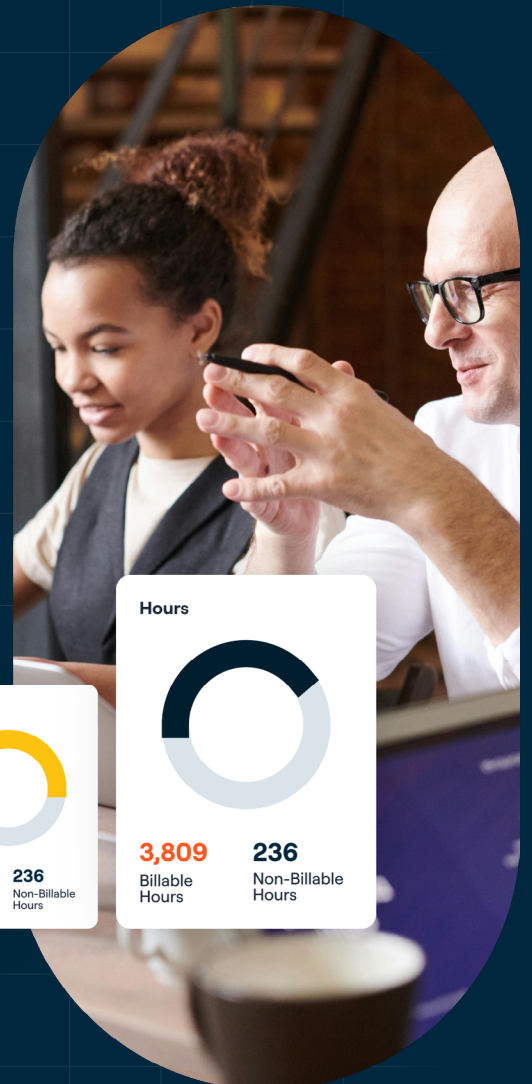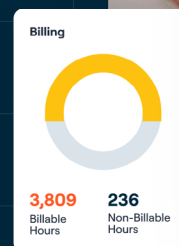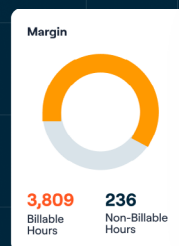
SCHEDULE YOUR CUSTOM DEMO →

bqe

About BQE CORE

Running an architecture or engineering firm is demanding. Clients expect excellence. Projects move fast. And the business side often gets pushed aside or neglected.

To help firm owners like you overcome these challenges, BQE built CORE, an all-in-one platform created by an architect and an engineer who knew the challenges firsthand. CORE brings time tracking, project management, resource planning, invoicing, accounting, payroll, and even client relationship management together in one place, eliminating the chaos of spreadsheets and disconnected tools. The result: less stress, more productivity, and better profitability.

For more than 25 years, BQE has helped thousands of A&E firms gain real-time visibility into their business. With powerful analytics and easy-to-use tools, we empower leaders to make confident decisions, scale with control, and focus on the work they love.

Margin

3,809
Billable Hours

236
Non-Billable Hours

Billing

3,809
Billable Hours

236
Non-Billable Hours

Hours

3,809
Billable Hours

236
Non-Billable Hours

TO LEARN MORE, VISIT US →