



Portland, Seattle, Orlando, Ottawa

25+ Employees

Envelope Consulting

certasolutions.com



Three Offices. One Clear Picture.

How Certa Building Solutions Learned to See Its Whole Business at a Glance with BQE CORE Insights.



"I found my PMs like looking at Insights... It's helping them manage their projects, because they can see them in a simple snapshot. They've said, 'oh, this is brilliant. I've been looking for that information.' That's where Insights has really helped us. It's collated all of the data to help them run their projects more efficiently."

Liz McKenzie
Director of Administration, Certa Building Solutions



A Niche Practice Built on Precision, Now Spanning a Continent

Certa Building Solutions was founded in 2015 by Mark Rose, who brought a Canadian building-science background, where envelope systems are held to rigorous standard, to a U.S. market that badly needed it. What started with Mark and a handful of colleagues in Portland, Oregon has grown into a 25-person consultancy of architects, engineers, and building-science specialists.

Certa doesn't build — it advises. The firm assesses, designs, and oversees the rehabilitation of building envelopes: roofs, walls, waterproofing, and everything in between, for apartment complexes, HOAs, and new construction across the country.

While Portland remains the firm's hub for reserve studies and rehabilitation work, Seattle has become its design and architecture center, and a growing office in Orlando, Florida has built a niche in expert witness and construction-defect work. This year, Certa opened its newest office in Ottawa, Canada, moving the firm closer to their roots and spanning across borders.

That growth increased complexity to a breaking point. With three offices practicing in more than a dozen states, and now multiple countries, the firm is now large enough that no single person could hold the whole picture in their head anymore. Certa needed a way to see itself as clearly as it saw the buildings it was hired to evaluate.

When a Growing Firm Needed to See the Whole Picture at Once

By the time Certa brought on BQE CORE at the end of 2022, the firm had already outgrown the patchwork of spreadsheets and manual processes that had carried it through its early years. CORE gave Liz McKenzie, Certa's Director of Administration, a real system for running accounting and reporting across three offices, multiple disciplines, and a tax footprint spanning roughly fifteen states.

But one gap remained. To compare utilization across all 25 employees, or to see how one office's labor value stacked up against another's, Liz had to open multiple individual reports and manually export data to work with in another platform. She would stitch the comparison together by hand. Whenever the firm's leadership needed something a standard report didn't cover, like a specific breakdown or a one-off analysis, she was on her own to build it: pulling data out of three or four different reports and reconstructing it from scratch in Excel or Power BI, a tool she would be the first to say isn't her strength.

For a firm whose entire business is built on giving clients clarity about the condition of their buildings, not having that same clarity about its own performance was a problem worth solving.



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[The owner] had specific reports he wanted to review and came to me and said “Okay, this is what I want created.” Before I couldn’t do it or I’d have to run three or four different reports and then extrapolate information and build a completely new report for it in Excel or Power BI... coming to Insights it’s just easy. He wants a report and boom, boom, boom, I can build it in under an hour.

Liz McKenzie
Director of Administration

The Moment the Data Finally Made Sense

When Liz first saw BQE CORE Insights, she immediately recognized what it could do for the reporting problem she'd been living with. Rather than flipping through a report per employee, Insights let her build a single table — every employee, every metric, side by side. It was a quick “aha” moment where the power of the tool showed her the future value it would unlock.

Her first build was a straight utilization table: every employee's utilization rate, side by side, replacing a process that used to involve opening several separate pages. Her second was a labor contribution report — billable and non-billable hours, average bill rate, and billable value, rolled up into a contribution-per-hour and contribution-per-labor-dollar figure for each person and office. For the first time, Liz could see performance across the whole firm at a glance, rather than reconstructing it herself, page by page.

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When I first saw Insights, I was really excited. I saw how it's going to allow me to manipulate so many different reports... It's really improved our visibility on what the company is doing.

Liz McKenzie
Director of Administration



Building the Dashboards Certa's Leaders Wanted

As Liz got more comfortable in Insights, she started using it to solve problems well beyond the original utilization report. When Insights added Collections, she realized she could group the firm's sensitive financial reports into a leadership-only view — no longer needing to hand-pick which custom reports each project manager could access, one at a time.

She also built a quality-control table for her admin team, surfacing any project missing a workbook, a technical lead, or a design lead across the whole firm at once, instead of catching gaps project by project. When she needed a metric that didn't exist as a standard column, she found she could simply build the formula herself, unlocking even more insights into firm operations.

The clearest sign the tool was working, though, came from how quickly Liz could now respond to leadership. When Certa's Director of Architecture, Jim Riley, asked how long it would take to pull together a specific project breakdown, Liz had it back to him in twenty minutes. When the firm's owner, Mark Rose, comes to her with a report he wants built, she no longer has to reconstruct it from scratch in Excel — she builds it directly in Insights, often in under an hour. Nothing, she says,

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I found my PMs actually like looking at it in a table format. It's helping them manage their projects, because they can see them as a snapshot. They're like, 'Oh, this is brilliant — this is where I've been looking for that information.'

Liz McKenzie
Director of Administration

has taken her more than a day, and that was an extremely complicated request. Most reports are created in 30-40 minutes.

That speed changed how her project managers work. When she started sharing Insights views directly with them, in a simple spreadsheet-style format, the reaction was immediate.

Faster Answers, Clearer Numbers, Better Decisions

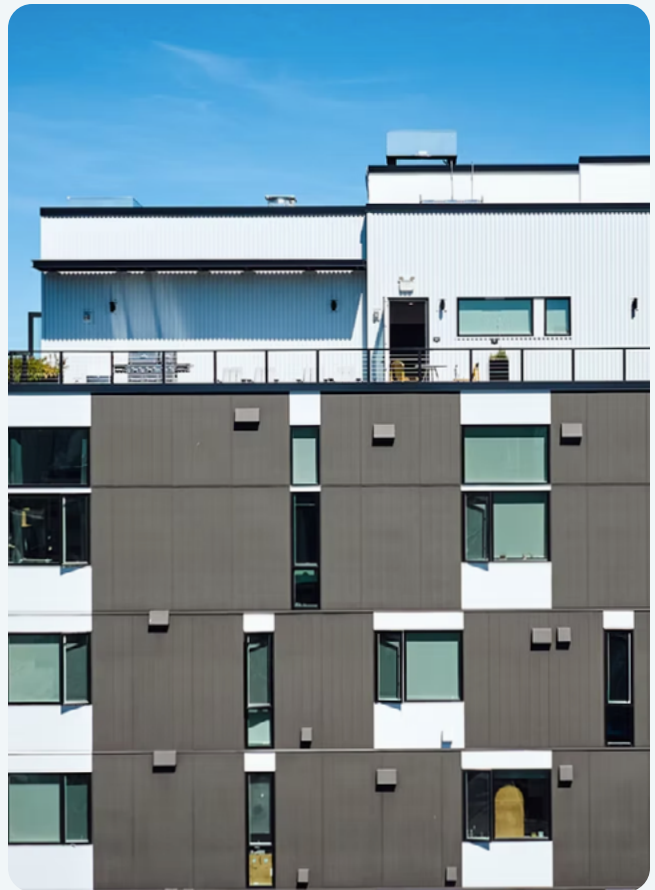
The impact of that visibility has reached beyond reporting speed into how Certa makes decisions. With utilization and labor-value data now visible across the whole firm, Liz and Certa's leadership can see where to invest in business development, where staff need support, and where the firm's revenue is actually being generated versus where new work is being brought in — a distinction that matters for a firm operating out of three offices in three different roles.

Liz is careful to describe that last figure honestly: Insights didn't generate the growth on its own. What it gave Certa's leadership was the ability to actually see it — and to see, for the first time, which offices were producing revenue, which were driving new business, and where the difference between those two things mattered.

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We're still growing as a company and insights is allowing us to see the information clearly for the first time.

Liz McKenzie
Director of Administration



By The Numbers

25 employees, across four offices now visible in a single comparative table instead of one report per person.

~15 states of active project and tax complexity, made easier to track and report on office by office.

20 minutes to turn around a leadership reporting request that used to take days rebuilding data from scratch in Excel or PowerBI.

10% profit growth, is clear and tracked alongside a much clearer office-by-office performance view in Insights.

A Firm Built Grow, Finally Able to See It

Liz isn't finished building. Her next goal is to hand fully built dashboards directly to Certa's project managers — profitability, targets, and actuals, all on one page for every project they run, without needing her to build it for them each time.

Liz has a goal for the leadership team to be able to read and generate the information directly from CORE using the Insights dashboards built for each of them specifically.

As Certa keeps expanding — deeper into Florida, newly into Canada, and into whatever comes next — the firm is carrying something it didn't have a few years ago: a way to see its own business with the same clarity it brings to every building envelope it evaluates. Certa Building Solutions built a growing, multi-office practice on precision. With Insights, that same precision now extends to how the firm understands itself.



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My goal is for all of my PM's, and the leadership team, to be able to read and filter out the relevant information for their projects, and the company. Insights is the tool that will get us there.

Liz McKenzie
Director of Administration

See your firm as clearly as you see every detail you draw or system you design, with BQE CORE Insights.

Request a Demo →

