



Phillips & Donovan Architects, LLC

Bedminster, Pennsylvania

15 Employees

Architecture

phillipsdonovanarchitects.com



How a 15-person architecture firm replaced disconnected systems, recovered lost revenue, and built a stronger foundation for growth



“When we implemented CORE, we found about \$130,000 in revenue we hadn’t billed. That wasn’t new work. It was work we had already done but didn’t have the systems in place to track and capture consistently. Once everything was connected, it became clear very quickly.”

Joe Phillips
Owner and Principal Architect



A Legacy Built on Leadership and Evolution

Phillips & Donovan Architects, LLC (PDA) has never relied on a single market, project type, or moment of growth. Founded in 1976 by George Donovan, the firm has grown through decades of economic change by staying adaptable, grounded in relationships, and committed to a broad, resilient practice.

Today, the firm is led by Joe Phillips. Heather Phillips, George's daughter is the business manager. Joe developed under George's mentorship, gradually taking on design and operational leadership, while Heather returned to the business to lead operations, finance, and marketing. Joe, and his very capable team, guided the firm through George's retirement, preserving its legacy while preparing it for the future.

With multiple offices and hundreds of active projects each year, the firm operates at a level of complexity that requires more than experience alone. As they prepared for the next phase of growth, it became clear the systems supporting the business had not kept pace with how the firm actually worked. What followed was a deliberate shift. Not a change in identity, but an upgrade in how the firm operates.

When Strong Firms Outgrow Their Systems

Like many legacy firms, PDA's operational structure evolved over time. Tools were added as needed. Processes were built around people. What began as practical solutions gradually became a patchwork of systems. Financial data, project tracking, and billing lived across spreadsheets, legacy software, handwritten notebooks, and manual workflows.

This is a familiar pattern across the industry. In more than 200 analyzed sales conversations, firms consistently described operating with two to four disconnected tools while relying on Excel to bridge the gaps.

At PDA, the impact was felt daily. Billing required days of focused effort each week. Time tracking was inconsistent and often disconnected from how projects were billed. Financial data was not readily available. It had to be requested, assembled, and interpreted before it could inform decisions. Project managers operated without a clear, reliable connection between the work being done, the fee remaining, and the financial outcome of the project.

The firm continued to deliver strong work, keeping clients happy and project moving. From the outside, the business appeared steady. Internally, the effort required to maintain that stability was increasing.

These conditions rarely create urgency on their own. They introduce small inefficiencies that accumulate over time. Hours lost to manual processes. Delays in billing. Missed opportunities to capture revenue. Decisions made without complete information.

For Joe and Heather, the pattern became clear. The firm was working harder than it needed to. The systems in place were no longer supporting how the business operated. They recognized that investing in better systems would deliver strong returns and build a more durable foundation.

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We had systems everywhere. Some of it was in spreadsheets, some of it was in software, some was just how people kept track of things themselves. It worked, but it wasn't connected, and that made everything harder than it needed to be..

Heather Phillips
Business Manager



Replacing Fragmentation with an Integrated System

The shift began with a clear objective. Replace disconnected tools with a single platform that reflects how the business actually operates.

This mirrors what drives successful transitions across the A&E industry. Firms that move forward are not looking to add another layer of software. They are looking to simplify. To bring time, projects, billing, and financials into one place so the business can run as a cohesive system.

That objective resonated immediately with Heather. This was the time to modernize how the firm operates at its core.

With the implementation of BQE CORE, Phillips & Donovan brought project management, time tracking, billing, accounting, and reporting into a single environment. That change reshaped how work moves through the firm.

Time is entered once and immediately tied to project performance. Billing is generated directly from that work, without the need to reconstruct invoices at the end of a cycle. Financial reporting reflects current activity, not delayed reconciliation. Projects are structured to mirror proposals, giving teams clarity from the moment work begins.

This shift removed a layer of effort that had quietly built up over time. Teams no longer had to reconcile information across multiple tools or question whether numbers aligned. The business now operates from a shared, reliable foundation.

The impact was both operational and financial. Processes became faster and more consistent. Time spent on administrative work decreased. Revenue that might have been delayed or missed became easier to capture, which had a big impact on the business.



Turning Operational Gains into Financial Results

The impact of this shift was immediate and measurable. Within the first year, the firm identified and billed approximately **\$130,000 in revenue** that had previously gone uncollected.

This was not the result of new work or higher fees. It came from tightening how work was tracked, reviewed, and billed. Projects that would have been delayed, overlooked, or written off were now captured accurately and billed at the right time.

This pattern is consistent across the industry. When firms move away from manual billing and disconnected tools, revenue leakage becomes easier to identify and recover.

Billing, which once required a day and a half of focused effort each week, became part of an ongoing workflow. Invoices are generated directly from project activity rather than assembled at the end. What was previously a disruptive task became a routine part of how work moves through the firm.

The time savings were meaningful. The consistency was more important. Leadership no longer had to step away from design, client work, or strategic decisions to manage administrative

tasks. That time was returned to the areas that drive the business forward.

Financial performance became more stable as well. Revenue is captured closer to when work is completed. Billing cycles are shorter and more predictable. Cash flow improves as a result.

These outcomes address one of the most common concerns among firm leaders evaluating new systems. The question is rarely whether a platform can improve operations. The question is whether the improvement justifies the change.

In this case, the answer was clear. The system more than paid for itself through better execution of work the firm was already doing.

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Billing used to take about a day and a half every week. It was something we had to stop everything else to get through. Now it's built into the workflow, spread across the team, and it takes a fraction of the time.

Joe Phillips
Owner and Principal Architect

Equipping Project Managers to Run Better Projects

One of the most meaningful changes occurred at the project level.

Before implementing CORE, understanding project performance required extra effort. Project managers tracked information manually, requested updates from the office manager, and had to review performance after the fact. This is common across the industry, where systems are built for accounting teams and project managers rely on spreadsheets to manage their work.

With CORE in place, that dynamic shifted. Project managers now have direct access to the information that drives decisions. Time aligns with each project phase, while remaining fee and work in progress are visible alongside actual effort. Billing status and client payments are available without waiting on accounting.

This changes how projects are managed in real time. Teams see when a phase is trending over budget and adjust early. Client conversations are grounded in current data rather than reconstructed history, creating consistency from kickoff through completion.

Accountability becomes part of the workflow. Time entries include clear descriptions of work performed, supporting both internal clarity and client communication, particularly for hourly work where transparency influences trust and payment.

Over time, these changes reshape how the firm operates. Project managers work within the system, with a clearer connection between the work they manage and the financial outcomes it produces. The result is greater consistency across projects, stronger control over performance, and fewer surprises as work progresses.



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Before, our project managers had to piece things together or ask someone else for the numbers. Now they can see exactly where they are against the fee and the time. It changes how they manage the project day to day.

Heather Phillips
Business Manager

Improving Cash Flow and Reducing Friction

Beyond internal operations, the firm improved how it gets paid. With integrated billing and ePayments, invoices are issued more quickly and payment cycles shortened. In many cases, clients now pay immediately by credit card rather than waiting 30 to 40 days for checks to be processed and received, with fees passed on to the clients.

This shift addresses a persistent challenge across architecture and engineering firms. Projects may be profitable on paper, but delays in billing and collections create gaps between completing work

and receiving payment. Over time, those gaps introduce unnecessary pressure on cash flow.

At PDA, that gap narrowed significantly. Invoices are sent closer to when work is completed. Clients have a clear and convenient way to pay. The result is a more consistent flow of cash into the business, without additional follow-up or administrative effort.

This consistency changes how the firm operates. Instead of managing around delayed payments, leadership can plan with greater confidence. Investments in technology, team development, and operations can be made from a position of stability rather than caution.

Cash flow becomes less reactive and more predictable, supporting the firm's ability to continue improving how it works and grows.

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We're getting invoices out faster, and clients are paying faster. In a lot of cases, they just pay by credit card right away instead of waiting weeks. That's made a real difference in how consistent our cash flow is.

Joe Phillips
Owner and Principal Architect

Strengthening Control and Reducing Risk

Some of the most meaningful improvements showed up in areas that are easy to overlook until they become a problem.

Tasks that once required days of manual effort, such as professional liability reporting, can now be completed in hours using structured, reliable data. What had been a stressful, time-consuming process became predictable and manageable,



freeing up Joe's time to focus on clients, business development, and mentoring his team, rather than administrative pressure.

This level of control extends across the business. Financial reports, project performance, and billing data are available when needed, without waiting for manual preparation or reconciliation. Leadership can review the health of the firm with confidence, and teams can operate with a clearer understanding of where things stand.

The impact is subtle but important. Fewer decisions rely on incomplete information. Fewer issues surface late. The business runs with a greater consistency and control, reducing risk while improving the overall quality of execution.

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Things like liability reporting used to take days to pull together the data. Now we get what we need in a few hours, saving us time and money. That kind of visibility makes a big difference in how confident you feel running the business

Joe Phillips
Owner and Principal Architect

A Support Experience That Builds Confidence

One of the most consistent barriers to change in architecture and engineering firms is not the software itself. It is the uncertainty that comes with implementing it. Questions around data migration, onboarding, and team adoption often slow decisions or prevent firms from moving forward altogether. At PDA, that experience was handled differently.

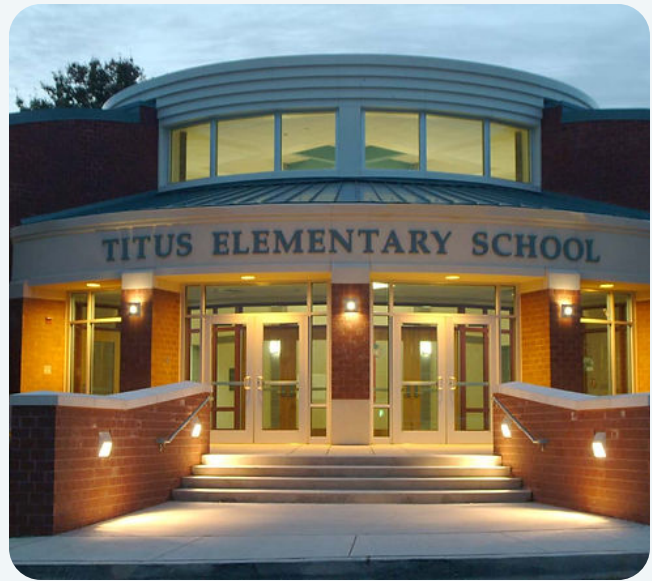
From the start, the firm worked closely with a dedicated support manager who took the time to understand how they operate. This was not a one-time onboarding process. It was an ongoing relationship that evolved as the firm's needs changed.

That support shaped how the team adopted CORE. Through regular conversations, they refined billing workflows, improved how reports were structured, and gained a clearer understanding of the financial side of the business. For a leadership team without a traditional accounting background, this guidance was particularly valuable. It provided context behind the numbers, not just access to them.

Over time, the system became more than something the firm uses. It became something they understand. That distinction matters.

Instead of working through uncertainty, the team operates with confidence. Questions are resolved quickly. New capabilities are introduced in a way that fits how the firm works. Adoption continues to improve without disrupting day-to-day operations.

This level of support removed a common point of friction and allowed the firm to realize the full value of the system more quickly.



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Having someone who understands how we work and can show us better ways to use the system has been huge. We're not just using the software. We're actually improving how we run the firm.

Heather Phillips
Business Manager

Building for What Comes Next

Phillips & Donovan Architects is not only improving how it operates today. It is preparing for what comes next. The firm is actively planning for its next ownership transition, identifying future leaders and creating a structure that supports shared responsibility, allowing knowledge, relationships, and leadership to carry forward without disruption.

The firm software is the foundation supporting that transition. With stronger systems in place, the business is easier to understand, easier to manage, and easier to scale across multiple

leaders. Financial performance is clearer. Project execution is more consistent. The connection between decisions and outcomes is more visible across the firm.

These conditions make it possible to develop future partners with greater confidence. They also help preserve what has made the firm successful over the past five decades.

Phillips & Donovan has maintained its strength by staying flexible. The firm continues to work across a diverse mix of project types, allowing it to adapt as markets shift. It continues to invest in its team, mentoring the next generation of leaders. It continues to refine how it operates, making steady improvements that build over time.

The introduction of CORE did not change the identity of the firm. It strengthened the structure behind it.

Across the architecture and engineering industry, firms that endure tend to follow a similar path. They reduce friction. They align their systems with how work actually happens. They create consistency without limiting flexibility.

PDA has taken those steps deliberately. As the firm looks ahead, the focus remains steady. Continue improving. Continue developing the team. Continue building a business that is prepared not just to grow, but to last.



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We weren't looking to add another tool. We needed something that could bring everything together. Once we had one system handling projects, time, and billing, it changed how the whole firm operates.

Heather Phillips
Business Manager

Your ambition scales, clarity grows, and creativity thrives with BQE CORE.

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