BQE CORE CUSTOMER CASE STUDY

Trotter & Associates, Inc.

Corporate Office: St. Charles, IL | 70+ Employees | Consulting Engineers | trotter-inc.com

Sound Information = Steady Growth: How Trotter and Associates Built a Firm Meant to Outlast Its Founder

> ***"I use CORE at two different levels. Day to day, I have a custom dashboard that's my snapshot of the business. In about 40 seconds each morning, I know what invoices were paid, where we stand on accounts receivable, and what our utilization was the previous week. For the bigger picture, I can generate my business reports throughout the year instead of spending 40 to 60 hours putting them together manually once a year."***
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> **Scott Trotter**
> Founder & President, Trotter and Associates, Inc.

A Firm Built to Grow Its Own Leaders

In 1999, Scott Trotter walked across the street from the small St. Charles, Illinois firm where he'd spent years training as an engineer, and started something of his own. He brought a handful of colleagues, a strong reputation in the region's tight-knit water and wastewater community, and a plan built around three ideas: nurture client relationships, build the expertise of the team, and guarantee operational stability.

Trotter and Associates, Inc. (TAI) started with two clients, the cities of St. Charles and Batavia. Both are still clients today. The firm has grown from four people to more than 70, expanding from its original water and wastewater focus into a comprehensive approach to municipal infrastructure - structural, architectural, electrical, mechanical, transportation, stormwater, municipal engineering, GIS, and parks and recreation — now serving more than 90 municipalities across Illinois and Wisconsin.

Much of that growth has been deliberate. Trotter set an early target of doubling the firm roughly every six years, and has landed somewhere between 12 and 18 percent annual growth in most years since. A large part of how TAI sustains that pace is by growing its own talent: the firm's internship program draws more than a dozen students from nine different universities into its four offices every year. Last year, eight of nine graduating interns came on as full-time hires. Several of TAI's other shareholders started as interns.

That's the culture Trotter built: people grow up inside the firm, and stay. This makes it all the more important that the systems underneath them can keep pace.

> *Aaron Berry and Chris Marschinke both started with the firm in high school. They have both gone from staff engineers to project engineers to project managers. Aaron is now the Director of Business Operations, and Chris is a Sr. Project Engineer, and both are shareholders and sit on the board of directors.*
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> **Scott Trotter,** Founder & President

When Growth Outran the Data Behind It

Like many engineering firms, TAI's earlier systems relied on timesheets completed after the work was performed, with project information managed through a combination of established internal processes, spreadsheets,, and a founder who kept tabs on everything because the firm was still small enough for that to work.

Those practices served the firm well at a smaller scale, but as TAI grew, leadership saw an opportunity to make timely project information more accessible across the organization. Like many firms running on older, desktop-bound project and billing software — the kind still too common across the AE industry — TAI's tools weren't built for a workforce that was increasingly out of the office. Roughly twenty percent of the team works in the field on any given day, and pulling accurate, timely data out of a system tied to an office server had its own daily friction.

The priority was maintaining TAI's established standards while giving employees and project managers better tools to capture and review information closer to when the work occurred. In an hourly-billing business serving municipal clients, timely information strengthens project oversight and gives leadership greater visibility as work progresses. That gap, between how fast the firm was growing, how fast leadership decisions need to be made, and how current its information actually was, became the thing TAI set out to close.

> *Daily time entry isn't about administration. It's about good project management. Capturing work while it's fresh provides more timely, accessible project information, helping us better manage our projects and deliver greater value to our clients and the communities that we serve.*
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> **Scott Trotter,** Founder & President

Trading Gut Feel for Sound Information

TAI moved to BQE CORE, drawn first by something simple: it's web-based, with a full mobile app, which meant field staff could log hours and see project details from a job site instead of waiting to get back to a desk. For a firm where a fifth of the team is out in the field most days, that alone streamlined an administrative process and gave field staff more immediate access to project information.

The bigger shift was in how Trotter himself started using it. Instead of waiting for month-end or quarter-end to understand how the firm was doing, CORE's reporting gave him a live read on the business — invoices ready to send, utilization rates, backlog, accounts receivable, project profitability — whenever he needed it. What used to require digging, or waiting for someone else to compile a report, was suddenly just there at his fingertips.

TAI is now taking the next step in making CORE their all-in-one firm management system by rolling out CORE's CRM module to manage its client pipeline and the capital improvement plans it builds for municipal clients years in advance — work that, until now, has lived mostly in project managers' heads. Trotter is candid that it's a work in progress, not a finished transformation. That kind of honesty is itself part of how TAI operates: adopt deliberately, roll out in phases, keep improving.

What changed first, and mattered most for the business, was the shift from reacting to data to acting on it.

> *Having good information, and the accessibility of that information, speeds up the process by which I can make informed decisions. I can make a call — go right, go left — based on sound information rather than gut feel.*
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> **Scott Trotter,** Founder & President

Taking the Temperature Out of Every Conversation

Today, CORE runs underneath almost everything TAI does operationally. Aaron Berry, the firm's director of business operations, uses it daily — for billing, for paying vendors, for reviewing the notes every employee is required to log against their time entries. Every project manager checks CORE's project dashboards and earned-value data to see exactly where their projects stand against their budgets.

Every week, TAI issues two reports pulled straight from CORE: a utilization report, tied to a weekly bonus structure that rewards productivity in real time rather than waiting for an annual review, and a percent-complete report that shows, project by project, how much work has been billed against how much has actually been finished. Both go to the whole company, not just the leadership team.

That transparency changes the tenor of hard conversations. When a project starts running over, everyone involved has already seen the data — every week, in the same report, in the same format — so the conversation about what to do next isn't personal or a surprise. It's just the next step to find a solution.

Trotter also built himself a custom dashboard inside CORE — invoices paid, receivables outstanding, last week's utilization, who might be short on work — that takes him about 40 seconds to read each morning. It's enough to catch a gap before it becomes a problem, without requiring him to dig through the underlying data himself.

No system eliminates the challenges that can affect project schedules or budgets. What CORE provides is earlier visibility, allowing the team to identify and address those issues sooner.

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> ***We can show, from the data, what's been billed against a project every week, and everyone knows intuitively where they stand. So when the conversation happens, it's not personal — it takes the temperature out of it, and hopefully eliminates a few surprises down the road.***
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> **Scott Trotter,** Founder & President

From Forty Hours to Forty Seconds

The clearest measure of how much has changed at TAI isn't a single statistic — it's how differently time gets spent.

Billing is faster and more current. TAI used to invoice every two weeks, but based on client feedback the firm moved to a monthly cycle instead. CORE's streamlined billing workflow allows TAI to generate invoices quickly while providing project managers with the opportunity to review them before they are finalized. This means invoices typically hit the street within the first ten days of the month. That shortens the gap between doing the work and getting paid for it, which matters for cash flow in a business built on hourly municipal contracts.

Reporting that used to take days now takes minutes. The annual corporate report Trotter used to spend 40 to 60 hours compiling by hand once a year, he can now generate on a monthly cadence in only a few minutes — turning what was a once-a-year retrospective into an ongoing strategic tool.

And the day-to-day management of a 70-plus-person, four-office firm runs on a rhythm: daily time entries, weekly utilization and percent-complete reports, a Monday morning project managers' meeting, and Trotter's own daily 40-second read on where the firm stands. None of it existed in this form before CORE.

For a firm growing 12 to 18 percent a year, that rhythm isn't a nice-to-have. It's the thing that lets growth stay controlled instead of chaotic.

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> ***We previously billed every two weeks. Based on client feedback, we moved to monthly invoicing, and now our invoices are typically out within the first week after we close the month. That shorter billing cycle helps us operate more efficiently.***
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> **Scott Trotter,** Founder & President

A Firm Built to Outlast Its Founder

Trotter is thinking in decades, not quarters. He talks about TAI as a “legacy firm” — one built with a transition plan already in motion, so that when he eventually steps back, the firm keeps operating with the same values and the same client relationships it has today. Several of TAI’s shareholders started as interns; the leadership pipeline he’s built isn’t hypothetical, it’s already running.

That long view shapes how Trotter thinks about the firm’s next chapter, too. TAI’s internal target is to operate today the way a 200-person firm would — not because headcount is the goal, but because if the firm’s systems, discipline, and information can support that scale now, hitting it later won’t require reinventing anything. CORE is a meaningful part of how that works: the operational visibility that once depended on Trotter personally now lives in reports, dashboards, and a rhythm the whole firm shares.

Trotter & Associates got here the way it started: through relationships, reputation, and a plan followed with real discipline. What CORE added was the infrastructure to keep the firm’s plan intact as it keeps growing, long after any one person is in the room to hold it together.

> *We’ve positioned ourselves to be a legacy firm. That means when I’m gone — which will happen eventually — the firm still has the same core values, and we’re still growing. That’s the one thing that would make me the proudest: when I’m no longer here, that we’re still making a difference.*
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> **Scott Trotter,** Founder & President