

LloydArchitects

Salt Lake City

15-20 Employees

Community Focused

www.lloyd-arch.com



With several years of data in CORE, Warren and Jennie Lloyd's firm now operates with a level of visibility that wasn't previously possible.



"We were very intentional about how our software systems would allow us to maintain that intimacy with our clients and our employees. BQE CORE lets us stay organized, compensate equitably, and keep a small-firm culture while operating at a high level."

- Warren Lloyd, AIA, LEED AP
Founding Partner



Pierpont by Urbana
Salt Lake City, Utah

An **AIA-Award-Winning Firm** with a **Community Mindset**

Lloyd Architects, a Salt Lake City-based firm, specializes in custom residential work, historic preservation, adaptive reuse, and hospitality projects. While growing beyond typical small-firm size to 16+ employees, they were determined to maintain a small, intimate firm culture while becoming a premier architecture firm in their region. To achieve this, they needed to get more done in less time, improve financial clarity, and scale efficiently. All without expanding into a corporate structure or sacrificing their personal touch.

Managing Finances in The Dark

Before adopting BQE CORE, Lloyd Architects faced several operational challenges. Their financial management was rudimentary, with profitability tracked informally. They utilized ArchiOffice for time tracking and invoicing, but didn't have a holistic view of their firm's finances or project-level insights. They reviewed

financials on a cash-in, cash-out basis, hoping that the cash-in was a higher amount.

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Maybe I shouldn't admit this, but I think our profitability plan before was, 'We'll just spend less than we bring in.' And I didn't really understand it beyond that. I kind of managed it the way you manage a household budget.”

- Jennie Lloyd,
Managing Partner

After using ArchiOffice for several years to track time and manage invoicing, the firm made the

decision to transition to BQE CORE. At the time, CORE was still early in its development, and the move presented some challenges. The team had to learn a new interface, transfer historic data, rebuild systems and processes based on the new software, explore new features, and navigate limitations in the product's initial release.

But the switch was made with a long-term vision: reduce inefficiencies, eliminate manual work, and implement a more integrated firm management platform. They saw that CORE was built for the entire team, providing tools to help their project managers and design staff, in addition to better financial management, accounting, and billing benefits.

Getting BQE CORE properly set up required an investment of time and effort. Configuring the system to align with the firm's workflows was critical, and ultimately, worth it. As the software matured and new features were introduced, invoicing and time tracking became significantly easier for the entire team. Over time, CORE delivered what the firm needed most: better visibility into operations, stronger financial data, project-level accounting, and insights that could drive smarter decision-making. It brought their financial management out of the dark and into the light.



Granary Campus SLC
Salt Lake City, Utah

The Power of Good Data and Reports

With several years of data in CORE, and even more carried over from their ArchiOffice days, Warren and Jennie Lloyd's firm now operates with a level of visibility that wasn't previously possible. CORE's reporting tools have become central to how they manage everything from project pipelines and employee performance to invoicing and long-term planning. Reports are easy to generate, customizable, and shareable, making them just as useful for internal decision-making as they are for collaborating with external partners.

Here are a few key reports they rely on to keep operations running smoothly:

- **Employee Time Card Report:** Essential for payroll processing and 401(k) reporting, this provides a clear record of hours worked across the team.
- **Expense Entries Report:** Used to ensure all contractor invoices, reimbursements, per diems, and employee-related expenses are accurately accounted for and paid.
- **Invoice Register:** When clients request summaries of amounts paid, this report delivers quick, professional snapshots of payment history.
- **Work in Hand:** This helps evaluate active project pipeline, identify hiring needs, and determine when to take on new work.
- **Work in Progress (WIP):** A key tool for monthly invoicing and monitoring project progress, especially useful when coordinating with project managers.

Three Falls Home
Alpen, UT



Granary Campus SLC
Salt Lake City, UT

- **Employee Utilization:** Crucial for tracking billable hours, planning workload distribution, and maintaining firm profitability.
- **Time Verification:** Offers detailed summaries of employee time by project phase and type—especially useful for AXP documentation and performance review.



Three Falls Home
Alpine, Utah

They also share select reports with an external consultant to gain additional insight into financial performance, management strategies, and overall firm health. Having clean, structured, and meaningful data at their fingertips has made collaboration more effective and guidance more impactful and actionable.

As the firm has grown, CORE has scaled with them, supporting smarter forecasting, project-level accounting, and more confident planning. Automating routine tasks, surfacing detailed financials, and gaining visibility into each phase of a project have helped them stay agile and focused. Today, reporting is more than just tracking performance; it's a strategic asset that fuels decisions, drives profitability, and gives the Lloyds confidence as they continue to grow.

The outcome has been transformative. CORE has evolved into a critical foundation for their success. With the data needed to make smarter decisions, the team can focus on what matters most: doing great work and managing a healthy, sustainable business.

Less Time Invoicing & Faster Payments

Their billing process is also significantly improved. Implementing CORE's built-in electronic ACH payments helps them get paid fast, improving cash flow and eliminating the time previously spent dealing with paper checks.

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The ACH payments have been a game changer for us. As soon as a client pays, I receive a notification email that a payment has been initiated and I don't have to make a trip to the bank. It's significant because I'm surprised how many people pay it instantly - over half of our payments each month are paid by ACH and arrive before the due date. And the fact that it's automatically recorded in CORE is really nice. It's a big time saver!

- Jennie Lloyd,
Managing Partner

Tasks that once consumed hours, like invoicing and payroll, have been streamlined and become more efficient. Meanwhile they don't have to chase down outstanding invoices, or waste time with paper checks and trips to the bank.

Top-Tier Firm with Best-in-Class Performance

The results were transformative. Lloyd Architects experienced a significant reduction in time spent on invoicing and payroll, freeing up those hours for higher-value activities like building stronger client relationships, more time designing, and mentoring their team. The introduction of ACH payments cut their payment processing time by 75%, leading to faster collections and improved cash flow. With project profitability now clearly tracked, the firm gained the ability to plan profitability, ensuring every project was financially viable. Additionally, BQE CORE's efficiency helped make it possible for Jennie to reduce her work hours from 40 to 30 hours a week without compromising productivity and allowing greater flexibility between work and personal life.

Thanks to BQE CORE, Lloyd Architects has streamlined operations and preserved the personal touch of a small firm, all while earning a reputation for excellence in their community. The firm now operates with greater clarity, agility, and control over its finances, allowing it to focus on what truly matters: delivering high-quality design and maintaining strong relationships with both clients and employees.

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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,
Founding Partner

With BQE CORE, unlock the freedom to pursue the projects you're passionate about.

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