



## Consulting Firm Gets a Grip on Complex Billing and Far-Flung Clients

*BillQuick and QuickBooks simplify time and expense tracking, and streamline invoicing for consultants on the go.*

### AT A GLANCE:

- COMPANY:** Zimmerman Weintraub Associates
- LOCATION:** Chicago, IL
- INDUSTRY:** Professional Services - Architectural Design Firm
- BUSINESS CHALLENGE:**  
Automate time and expense reporting for employees on the road; manage complex billing system
- SOLUTION:**  
BillQuick and QuickBooks: Premier Professional Services Edition
- RESULTS:**  
Together BillQuick and QuickBooks allow ZWA to:
  - Save \$90,000 per year in administrative overhead
  - Reduce time to generate invoices by 50 percent
  - Decrease time taken to complete expense reports from days to hours
  - Enter time and expense remotely
  - Allow analysis and management of revenue and expenses

*“Our business has been growing exponentially, and BillQuick and QuickBooks has grown with us. The time required for us to create an invoice has been reduced by 50 percent.”*

**Sandra Tracy**  
Director of Business Operations  
Zimmerman Weintraub Associates



Billable hours are the lifeblood of any professional services firm, and tracking expenses and invoicing in a timely manner are key to maintaining cash flow. BillQuick and QuickBooks provided a painless way for this Chicago-based firm to track hours and expenses—even from the road.

Zimmerman Weintraub Associates (ZWA), a project management and architectural design firm with annual revenues in the neighborhood of \$2.5 million, started operation in 1998 and adopted QuickBooks in 1999. Its 25 employees provide project management, architectural consulting, and design services to clients in the hospitality and commercial sectors, as well as federal government accounts.

### Business Challenge

The vast majority of ZWA's employees spend most of their time traveling to—or working at—client sites. Even while on the road these project managers and executives must submit reports on hours spent on projects, and expenses, in a timely fashion.

Sandra Tracy, ZWA's Director of Business Operations, wanted to give employees an

electronic reporting system that would integrate seamlessly with QuickBooks and protect financial data from unauthorized users. The QuickBooks Compatible software needed to be easy to use, economical, and flexible. Flexibility was extremely important because Tracy needed to assign multiple billing rates per client and per project in a variety of formats such as hourly, fixed, and percent complete.

Additionally, the ability to input, capture, and access data remotely was critical. Given that most employees travel extensively, delayed time and expense entry was unacceptable. ZWA needed a way for these employees to input data remotely.

### Solution Overview

After researching different time billing and project management applications, Tracy chose BillQuick for time tracking, project management, and invoicing. BillQuick and QuickBooks synchronize information about clients such as name, contact information, projects, vendors, invoices, and payments.

ZWA creates 30 to 40 invoices per month in BillQuick, and they automatically sync with



QuickBooks. Tracy says, “One feature I like is that I can create a draft invoice and send it to the project manager or principal for review. ... Eighty percent of our staff is usually offsite, so it’s difficult to do invoice reviews in person. [This way,] much of the review process can be done electronically.”

With BillQuick, Tracy also reviews project financial data, such as expenses, with managers, and she triggers automated reports to be sent on a regular basis to help keep costs under control.

**Business Benefits**

Since adding BillQuick and QuickBooks, employees are spending much less time filling out time sheets and expense reports. Under ZWA’s previous, manual system, employees could take days to complete expense reports, but BillQuick allows them to complete the chore in as little as a half-hour, from anywhere with BillQuick’s Web-based Time Card and Expense Log.

BillQuick and QuickBooks has also made the invoicing process much easier. As the number of clients, projects, and invoices have increased, BillQuick and QuickBooks have scaled to meet the demand. “Our business has been growing exponentially, and BillQuick and QuickBooks has grown with us,” says Tracy. “We would be dead in the water without them. The time required for us to create an invoice has been reduced by more than 50 percent.”

Customers have also benefited from the new invoicing process. “Invoices are more accurate, and customers like the look, the clarity and the details,” Tracy says.

In terms of time savings, BillQuick and QuickBooks let ZWA reduce duplicated work and cut costs. Tracy estimates the increased productivity alone is saving the firm \$90,000 per year.

Another BillQuick feature that helps Tracy boost her productivity is global change. “If I have a billing rate that’s wrong, I can select all [the affected] records and change them in less than 5 seconds—no searching manually or recalculating,” says Tracy. “Before, it was madness to try to locate all the records that needed updating.”

BillQuick and QuickBooks have also influenced the firm’s overall financial management because the executives have a better understanding of business activities. The principals rely on reports in BillQuick and QuickBooks to manage a project’s costs and review project status. Reports allow the firm to compare revenue with expenses, as well as analyze how much revenue was received from program management, project management, and architecture and interior design services.

*“We can make more informed business management decisions because of the great reports in BillQuick and QuickBooks.”*

**Sandra Tracy**  
Director of Business Operations  
Zimmerman Weintraub Associates

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**BillQuick Software**  
[www.billquick.com](http://www.billquick.com)

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