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Why Vantagepoint?

CRM and **Proposals**



I'M READY

Teresa Bever Product Director



- » Vantagepoint is an upgrade from Vision - industry proven
- » Same underlying business logic

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Streamlining &

» Considering years of customer requests and feedback

- » Adding efficiency to key processes
- » Reimagining features and functionality



Innovation and **Automation**

- » Purposeful innovation to increase value and productivity
- » ICR
- » Natural language interface
- » Fintech and automation
- » AI and ML
- » Integration friendly



Project

Command Center

streamlining the PM

project management

» Simplifying and

experience

functionality

toolset

» Reimagining the

» Track the entire

one place

PMs

resource planning

project lifecycle in

» More intuitive and

visual interface for

» Doubling down on

Dashboards & Analytics

- » Driving informed decision making right data, right time
- » Rich graphical representation of organizational performance data
- » Provide key performance metrics
- » Create charts. graphs, lists and more to display data
- » Call attention to key areas
- » Included with core product



User Experience & Interface

- » Fresh modern interface
- » Built with usability in mind
- » Reimagined features and improved user flows
- » More powerful and flexible user-defined componentry
- » Constantly evolving and improving based on user feedback
- » Browser and device agnostic - available on PCs, Macs, tablets
- » Modernized and expanded API

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Vision's Foundation

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- resource planning toolset » Track the entire
- Track the entire project lifecycle
- one place
 - More intuitive and visual interface for RMc



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Innovation and

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» Natural language

» AI and ML

Purposeful

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User Experience & Interface

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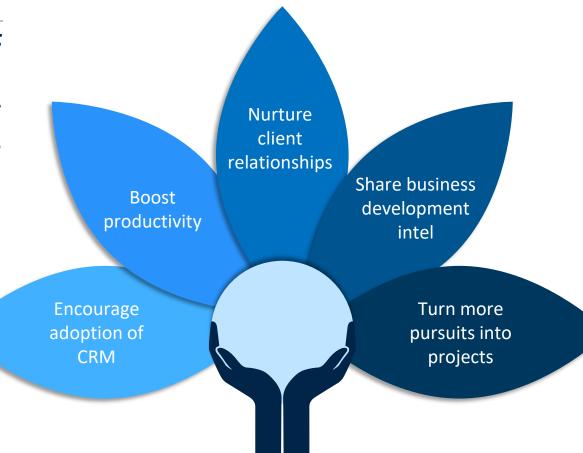


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Benefits of Vantagepoint CRM & Proposals

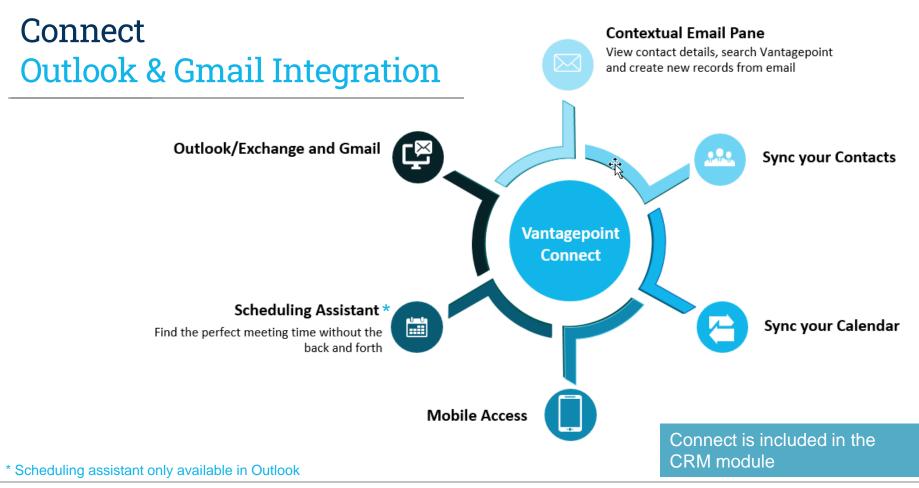


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Manage Business Development from Anywhere



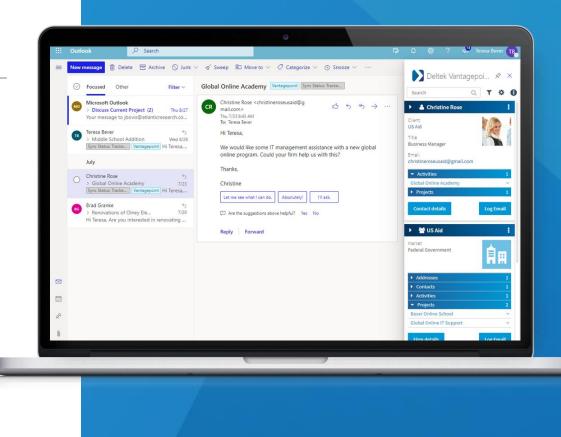
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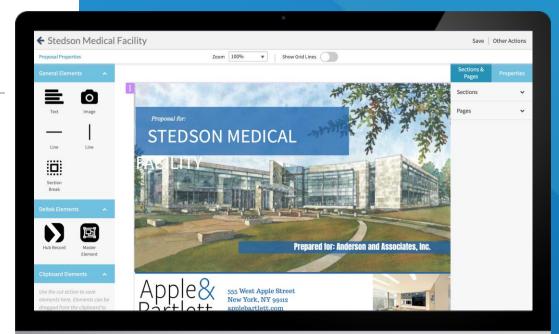
Connect Contextual Email Pane

- » Display Vantagepoint information in context of emails
- » Add new contacts or projects
- » Save emails as activities
- » Search Vantagepoint contacts, firms, and projects



Proposal Builder

- » Position your firm to win
- » Visual proposal builder
- » Drag and drop elements
- » Easily insert graphics
- Include boilerplate, project, employee, and company details
- » Create templates
- » Export to PDF or Word



Proposals are included in the CRM Plus module

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Activity Enhancements

- Simplified activity form
- Links & attachments
- Multiple firms

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Activities **Calendar and Dashboard**

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Dashboards Milestone Chart

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View upcoming milestones

Dashboards Pipeline

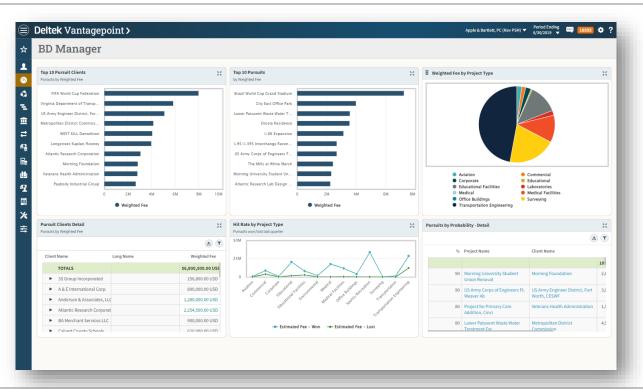
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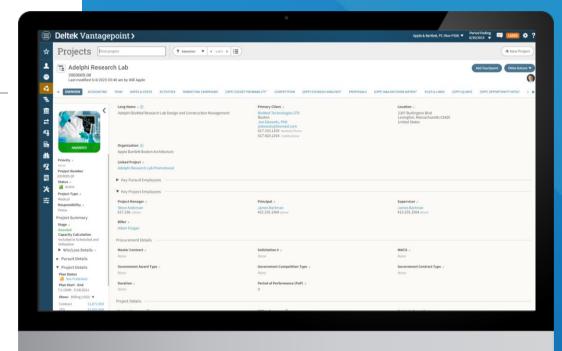
Dashboards Endless Possibilities



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Streamlined Projects

- » Opportunities + Projects = Projects with Win/Loss Process
- » Single source of truth
- » Seamless flow from pursuit to award
- » All features available regardless of stage





Firms

- » Manage all firms in a single location
- » Includes
 - » Clients
 - » Prospects
 - » Vendors
 - » Competitors
 - » Government Agencies

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Reducing Duplicates

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FIRMS

Middle

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Are You Looking F

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MARKETING CAMPAIGNS ASSOCIATIONS OUR TEAM FILES & LINKS PERSONAL INFORMATION

» Improved duplicate check

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Contacts Find contact

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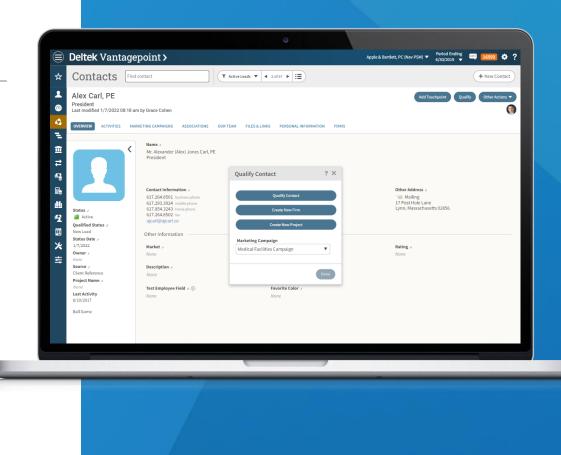
Marketing Campaigns

- » New calculations
 - » Actual Revenue
 - » Potential Revenue

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	×	Marketing Ca			T New Marketing Campaign
	⊥ ⊘	Medical Facilities Ca Last modified 3/28/2024 12:46 pr			Actions V
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	₽ ₩ ₽	Launch - End Date / 5/1/2024 - 5/31/2024	Organization J Cohen Assoc Corporate Admin		
•		Status /	Marketing Campaign Manager / James Bartman 415.335.1564 phone	Marketing Manager / Ann Johnson 415.126.1254 phone	Marketing Coordinator / Steve Anderson 617.236. phone
	×	Stage / Active	Actions		
	#	Type / Direct Mail Audience / CFOs Objective / Raise Awareness	First / Develop Invitation Engagement Goal / 150	Current / Campaign Kickoff	Next ≠ Follow-up Calls
		Currency / USD - US Dollar Exchange Rate Date / None Goals / Revenue Goal: \$55,00,000.00			
		Actual Revenue: \$12,662,352.00 Potential Revenue: \$16,170,000.55 Budget: \$20,000.00 Actual Cost: \$0.00			

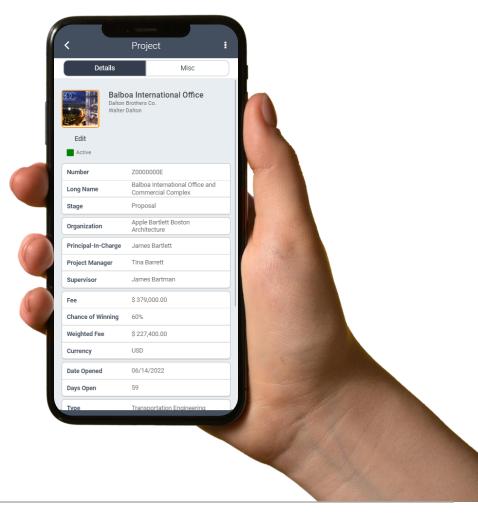
Enhanced Lead Qualification

- » One source of truth for all contacts regardless of status
- » Streamlined qualification process



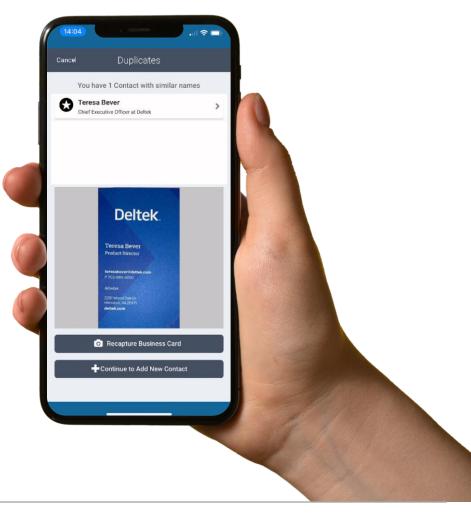
Mobile CRM Enhancements

- » New, modern look with images
- » Login improvements
- » Reduction of taps
- » Contact qualification
- » Win/loss process and awarded projects
- » Additional firm types
- » Business card scanner



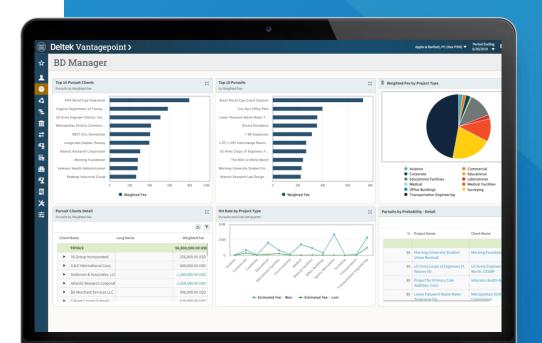
Business Card Scanner

- » Create a contact from snap of a picture
- » Uses Intelligent Character Recognition (ICR)



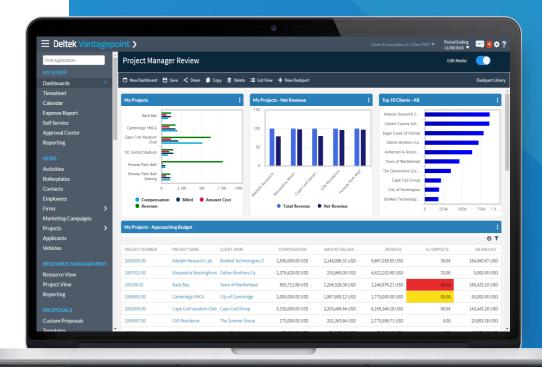
Recap

- » Encourage adoption of CRM
- » Boost productivity
- » Nurture client relationships
- » Share business development intel
- » Turn more pursuits into projects



Vantagepoint Commitment

- » Strong roadmap; solid strategy
- » Vantagepoint is unmatched in the market
- » In totality, there is not a better product out there, purpose-built for your industry
- » We are committed to you, your businesses, and your industry
- » All organizations will benefit from the value of Vantagepoint
- » Vantagepoint is an evolution that will help future-proof your business



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Thank You!

vantagepoint@deltek.com

