

Deltek

Why Vantagepoint?

CRM and Proposals

Teresa Bever
Product Director



DEAR FUTURE,
I'M READY

Compelling Vision-Using Organizations to Upgrade



Vision's Foundation

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

Streamlining & Reimagination

- » 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

- » Simplifying and streamlining the PM experience
- » Doubling down on project management functionality
- » Reimagining the resource planning toolset
- » Track the entire project lifecycle in one place
- » More intuitive and visual interface for PMs

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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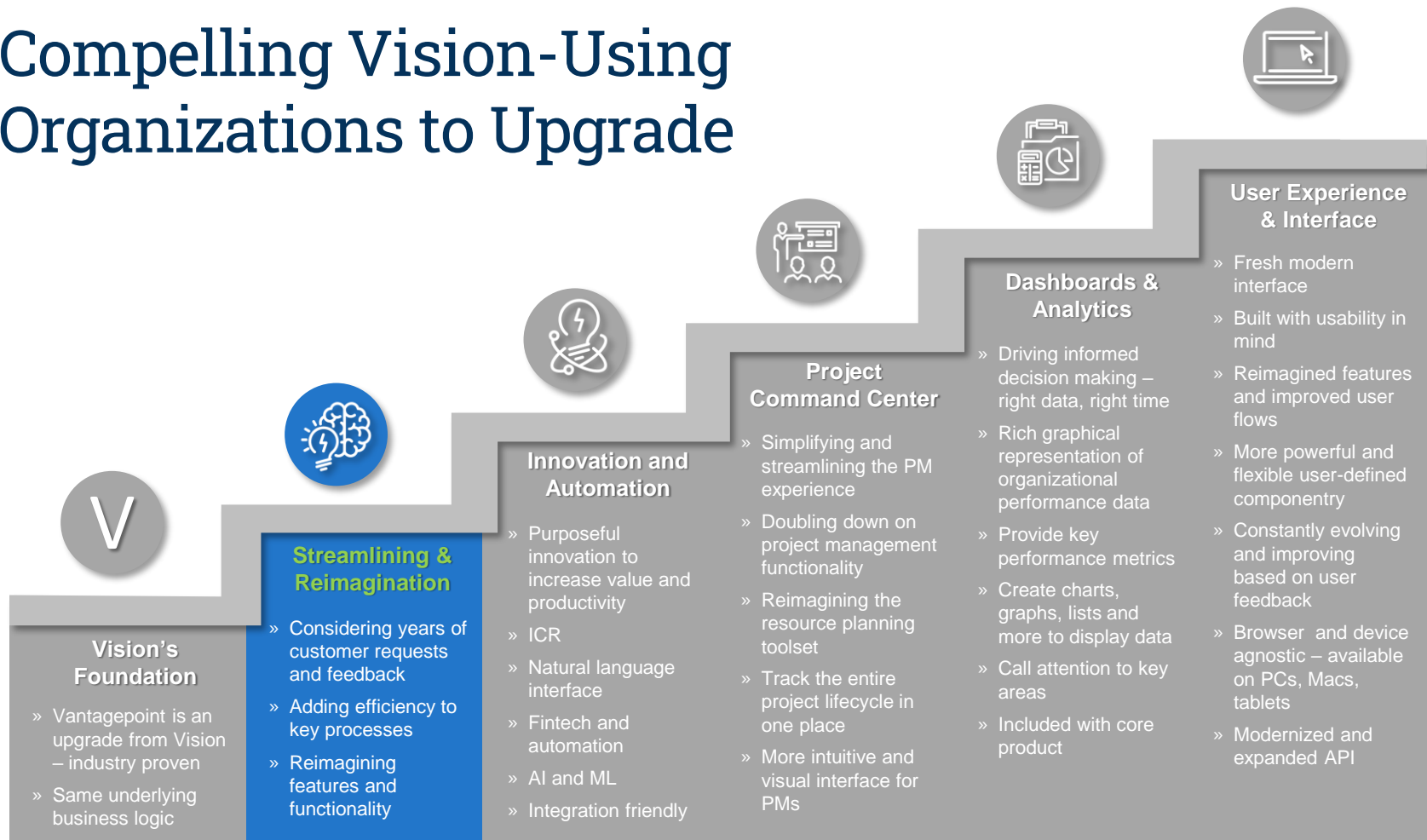
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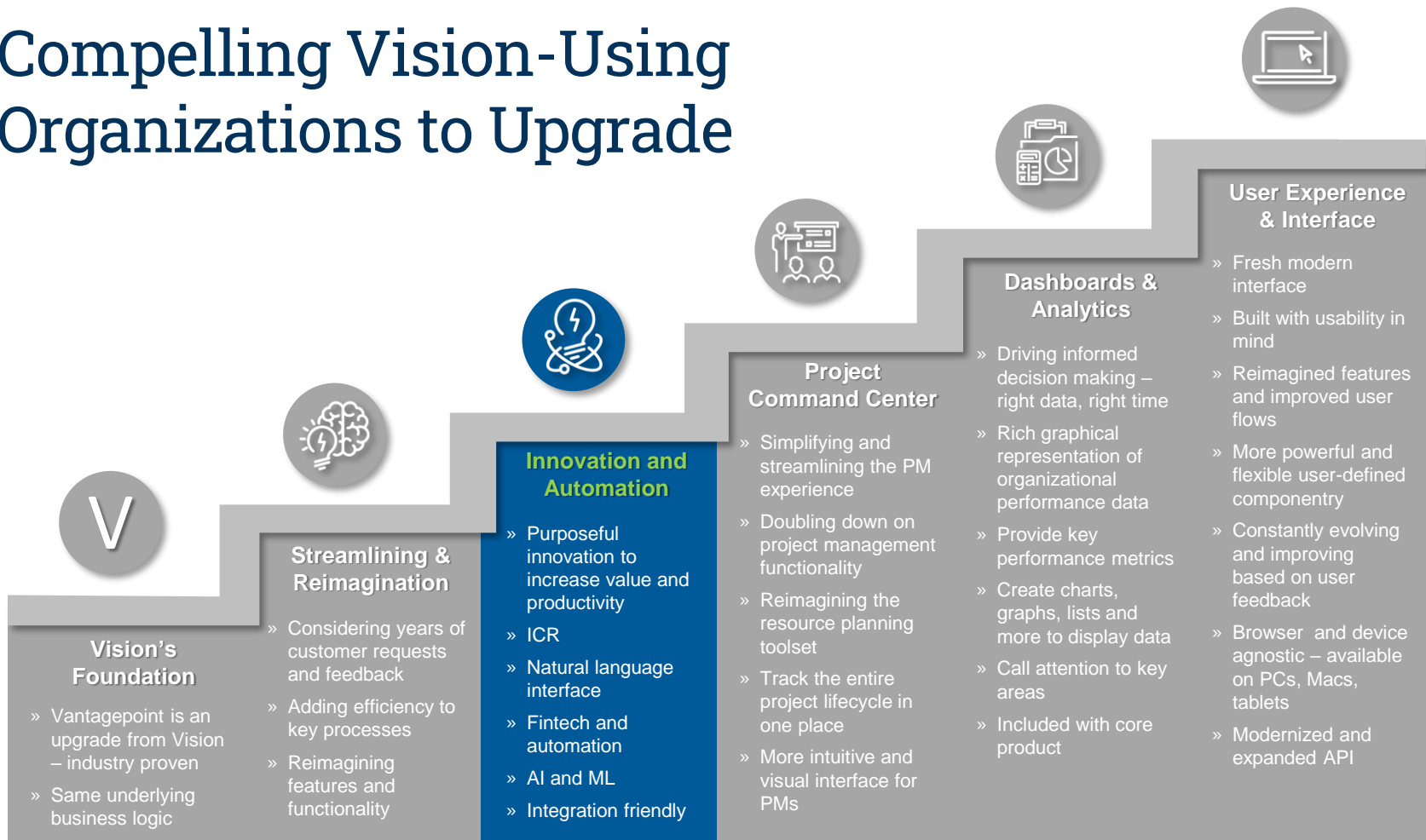
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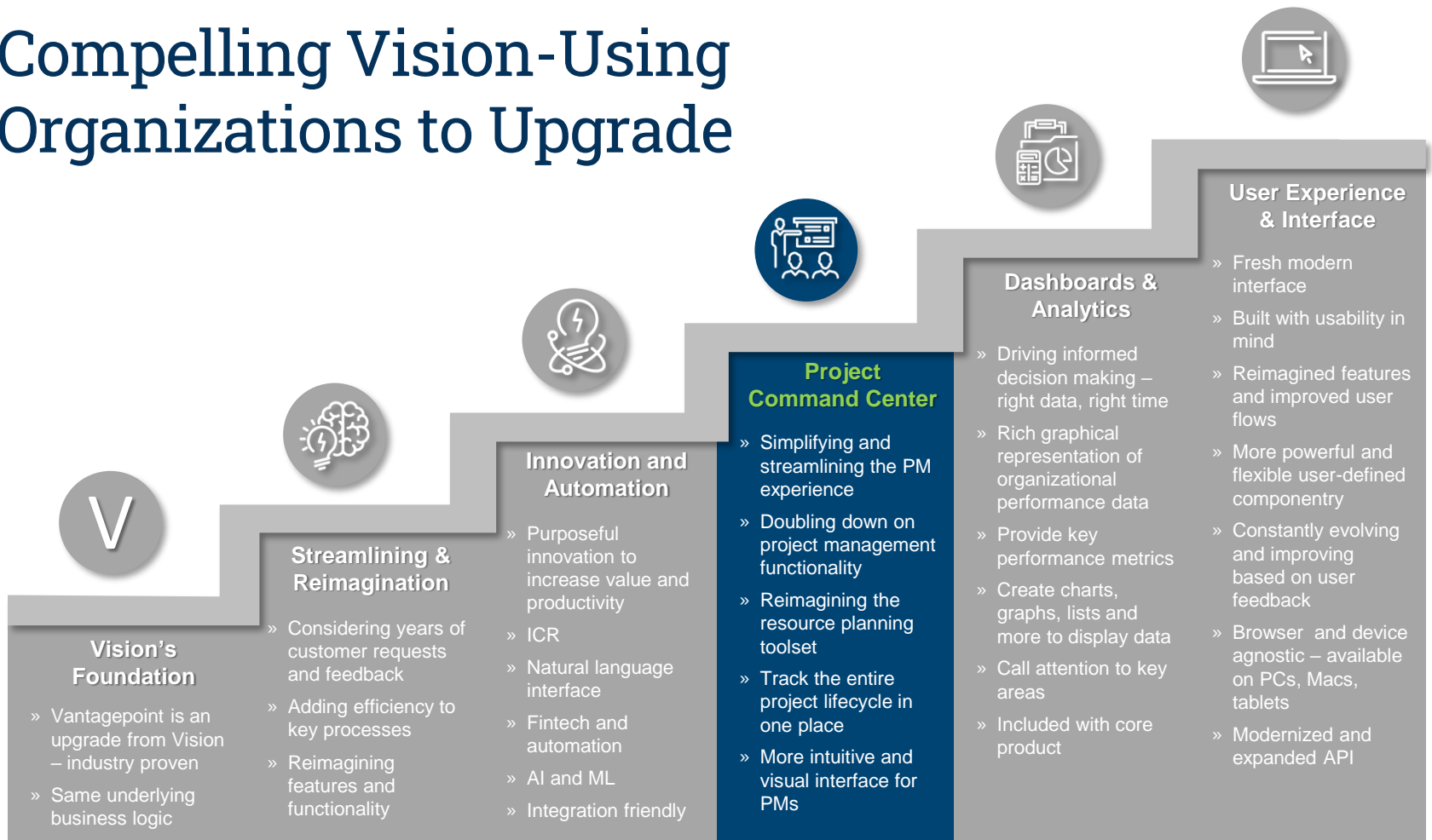
Compelling Vision-Using Organizations to Upgrade



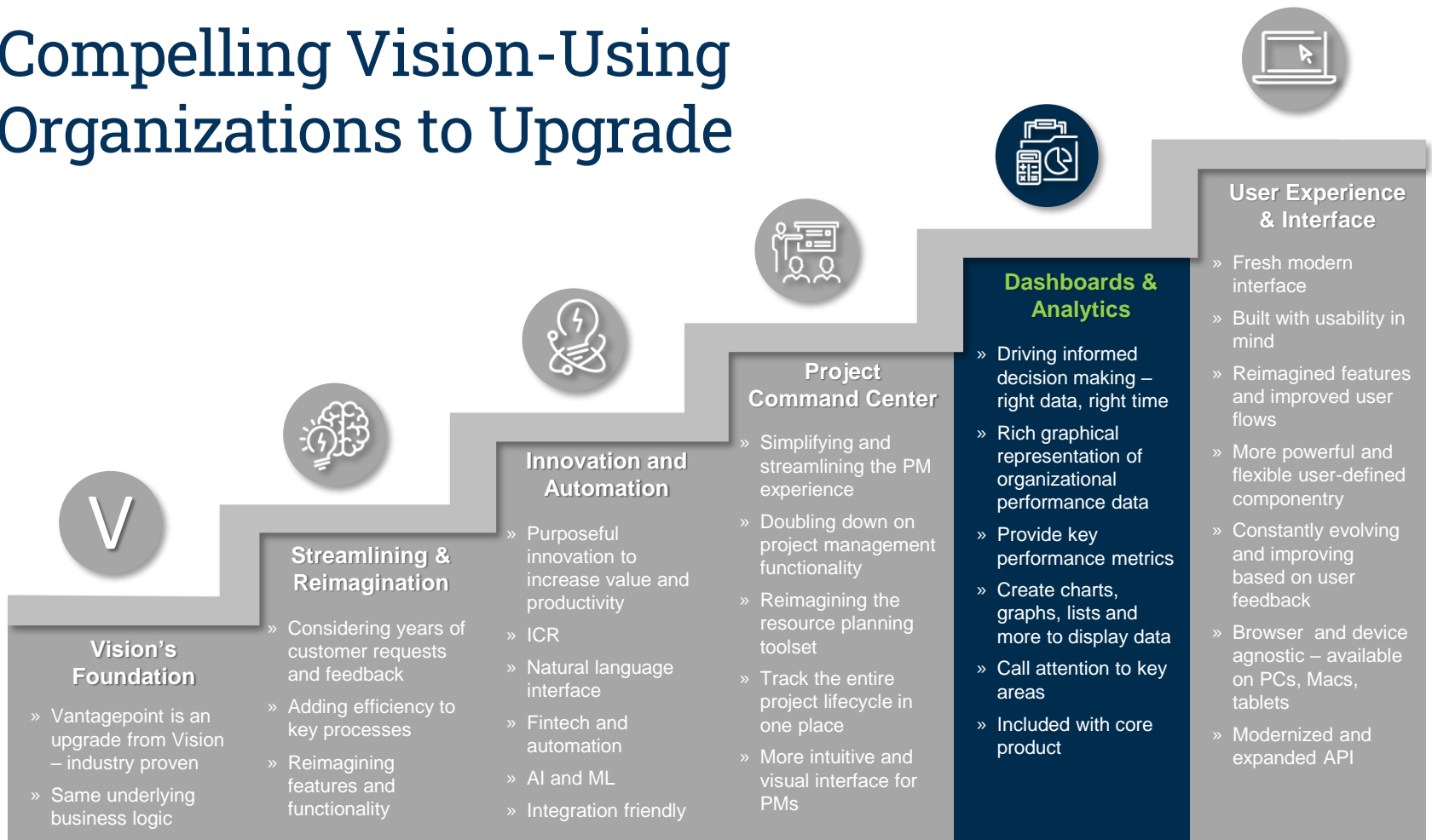
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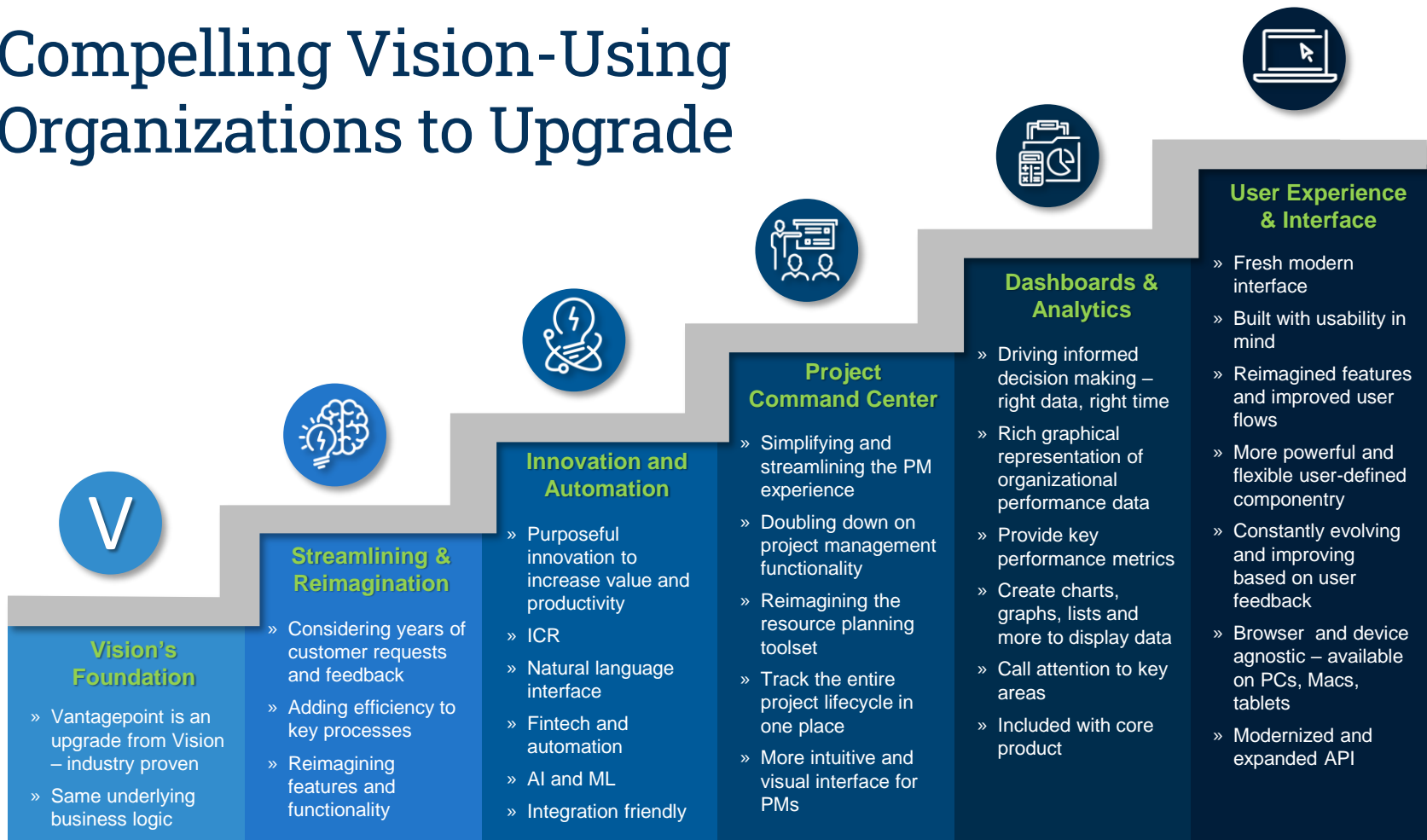
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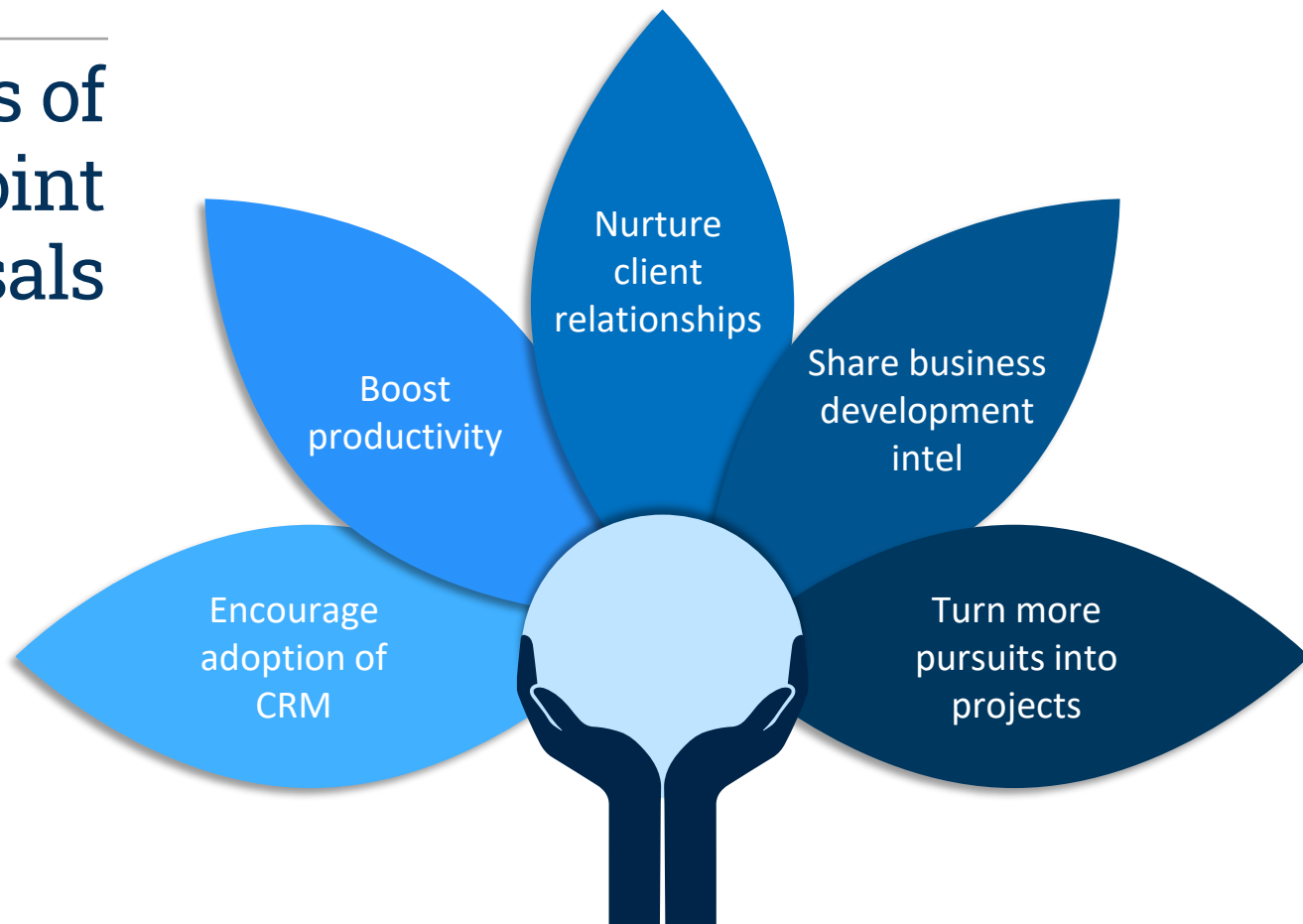
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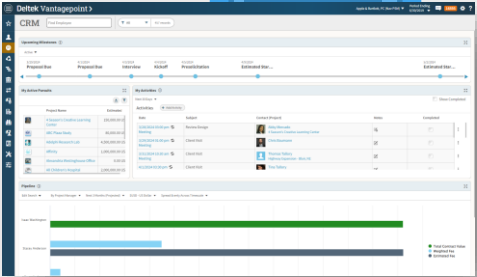
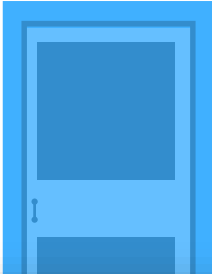


Benefits of Vantagepoint CRM & Proposals



Manage Business Development from Anywhere

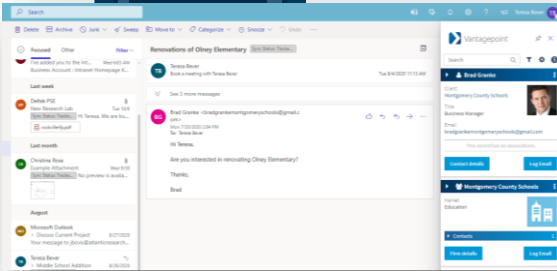
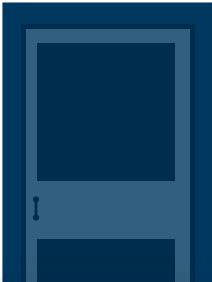
Vantagepoint
Browser



Mobile CRM

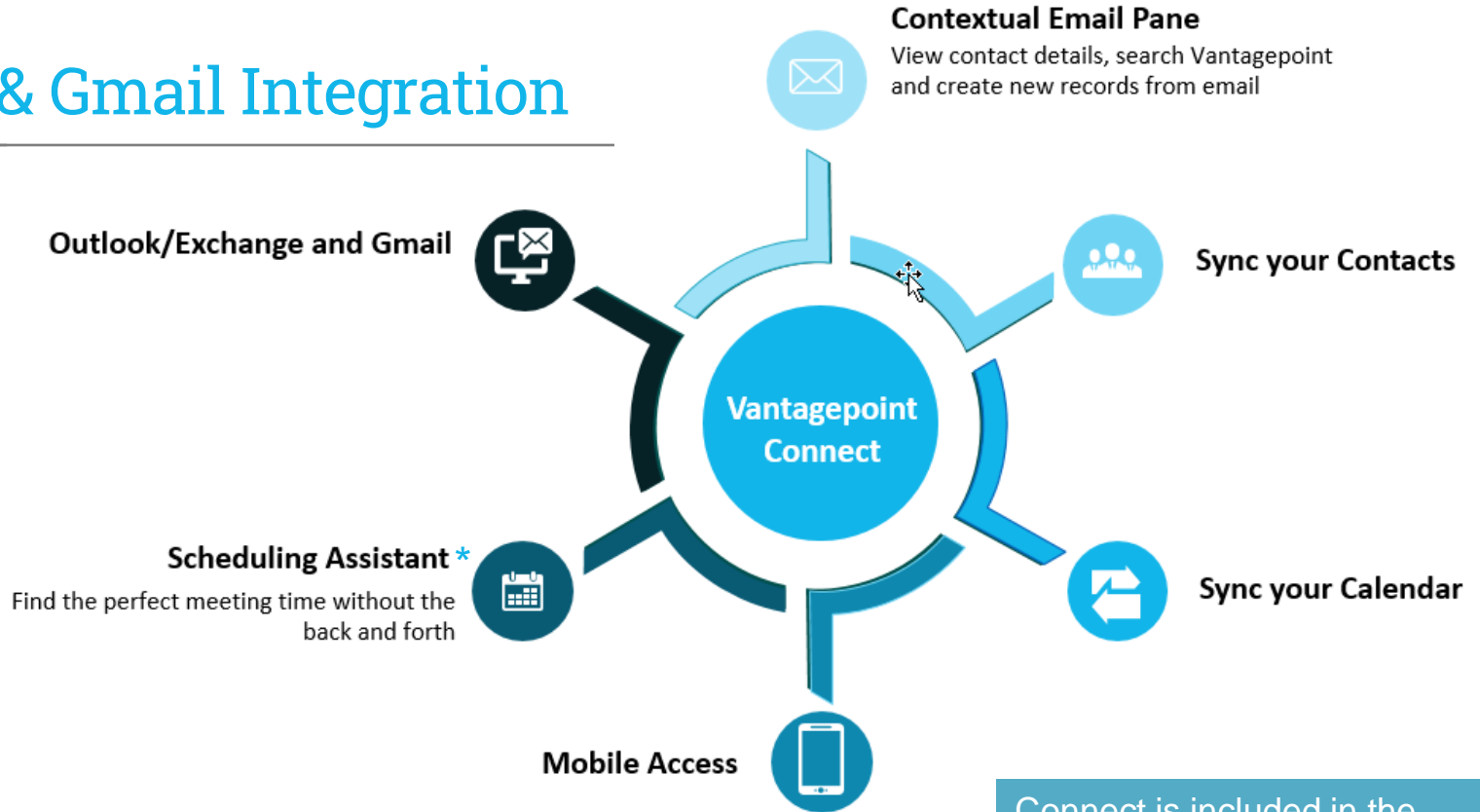


Vantagepoint
Connect



Connect

Outlook & Gmail Integration



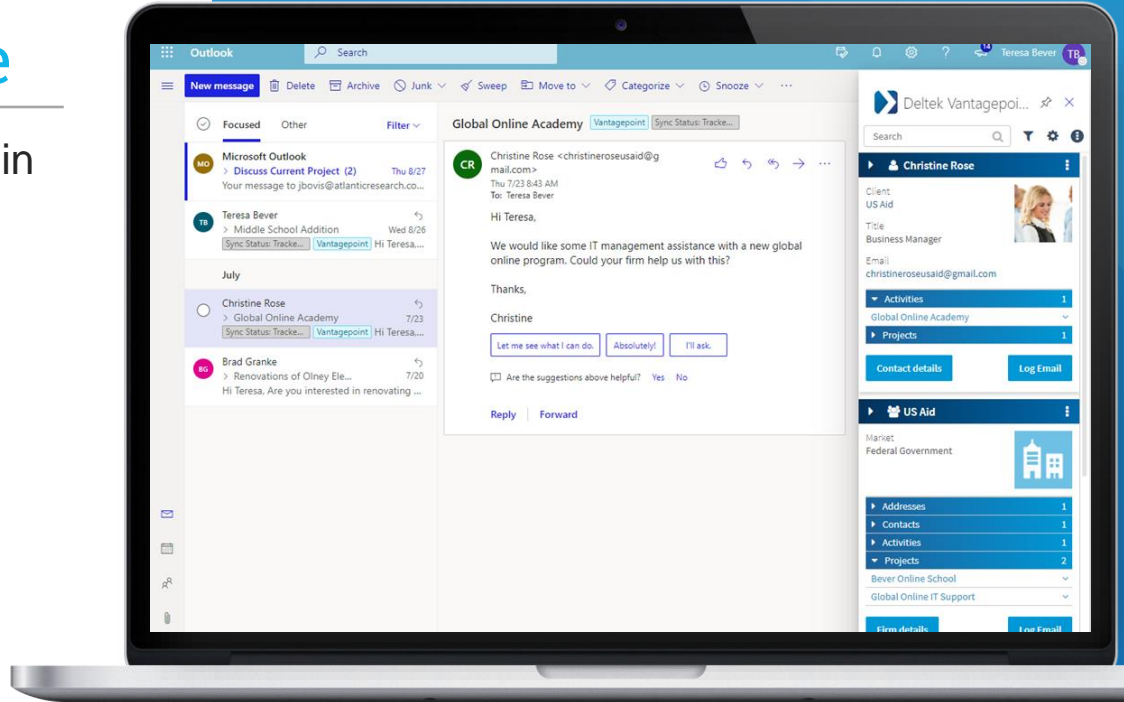
* Scheduling assistant only available in Outlook

Connect is included in the CRM module

Connect

Contextual Email Pane

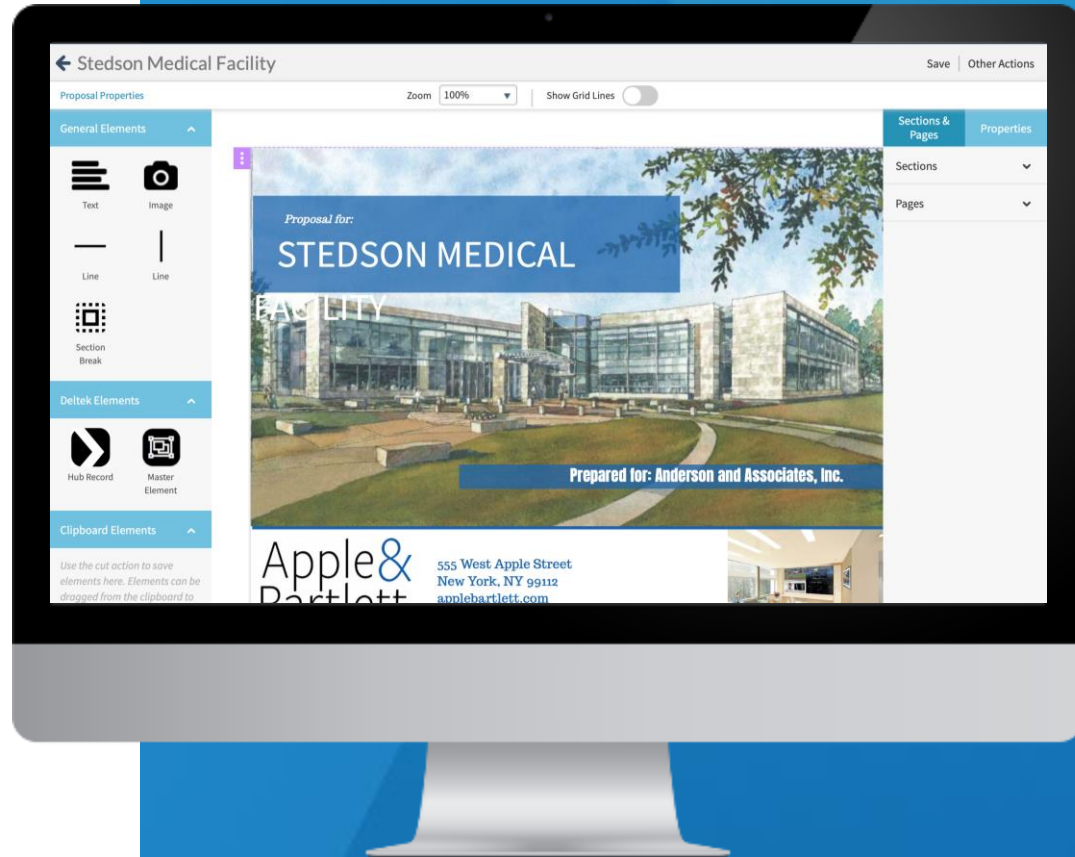
- » Display Vantagepoint information in context of emails
- » Add new contacts or projects
- » Save emails as activities
- » Search Vantagepoint contacts, firms, and projects



Proposal Builder

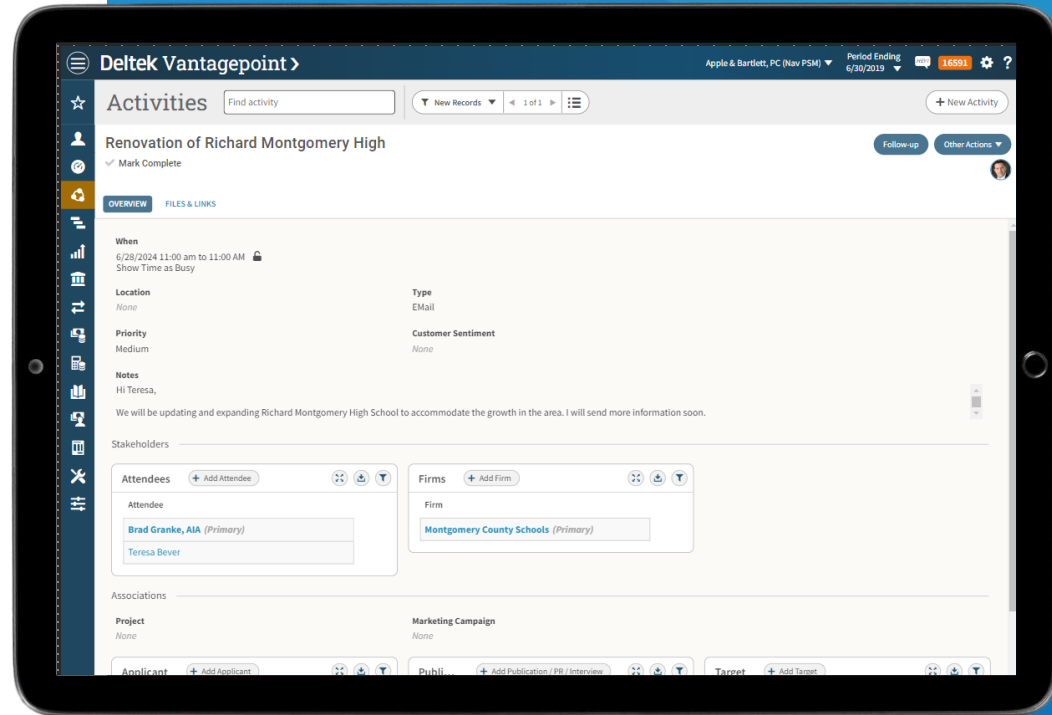
- » Position your firm to win
- » Visual proposal builder
- » Drag and drop elements
- » Easily insert graphics
- » Include boilerplate, project, employee, and company details
- » Create templates
- » Export to PDF or Word

Proposals are included in the CRM Plus module



Activity Enhancements

- Simplified activity form
- Links & attachments
- Multiple firms



Activities

Calendar and Dashboard

Deltek Vantagepoint > Apple & Bartlett, PC (Nav PSM) Period Ending 6/30/2023 16933

CALENDAR

Calendar Views

< 2024 >

Jan Feb Mar
Apr May Jun
Jul Aug Sep
Oct Nov Dec

3/28/2024

Views

- Events
- Tasks
- Timesheets

Calendars

- My Calendar
- Amy Ball
- Gracie Coppen

Calendar Settings

Today Mar 24 - 30, 2024 Day Week Month

MON 3/25 TUE 3/26 WED 3/27 THU 3/28 FRI 3/29

all-day

6AM

7AM Internal Staff Meeting

8AM Internal Staff Meeting

9AM

10AM

11AM Call Bob

12PM Lunch with Grace to Discuss Adelphi

1PM Client Visit

2PM

3PM Review Design

4PM

5PM

6PM

7PM

8PM

9PM

10PM









11PM

My Activities ⓘ

Next 30 Days

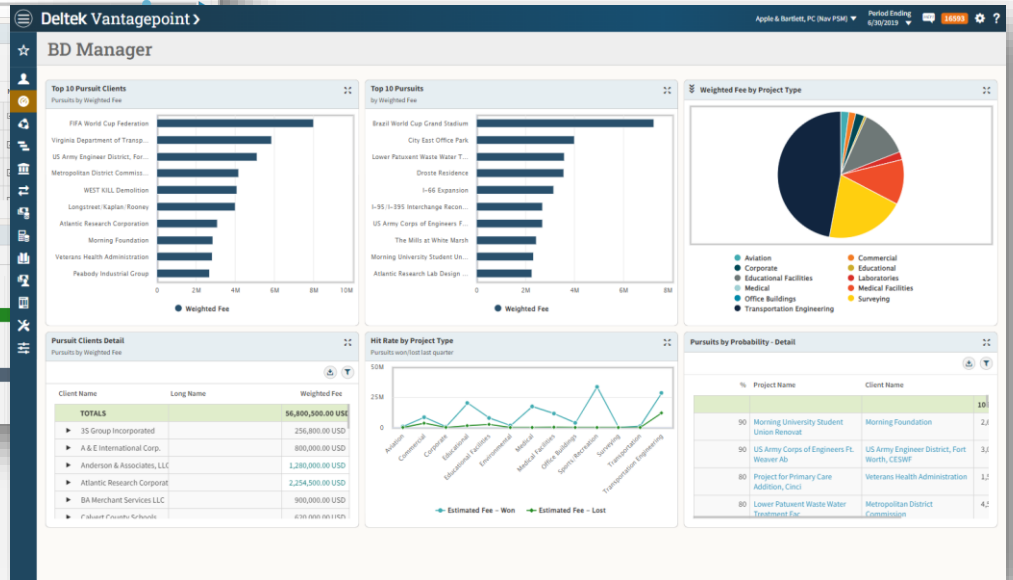
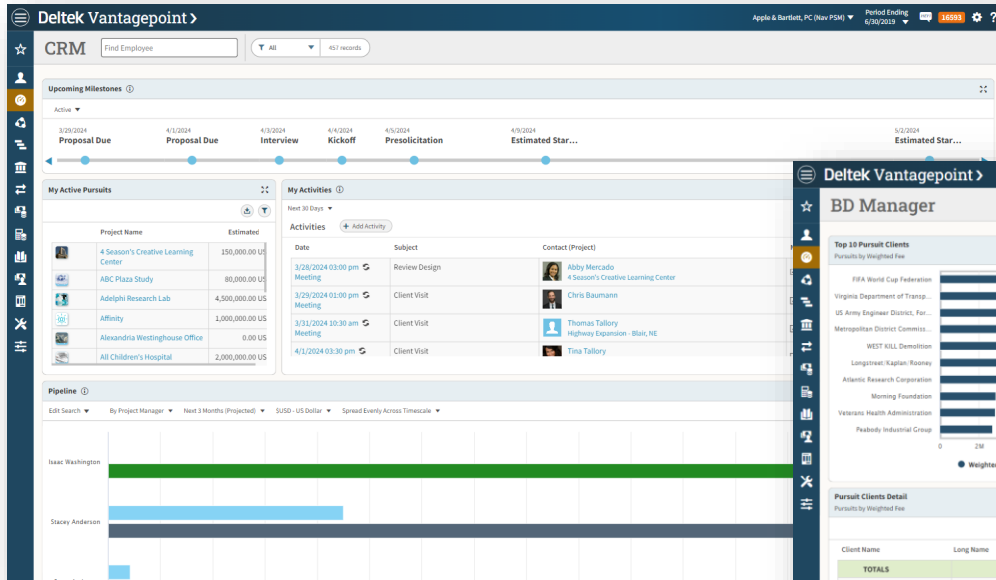
Show Completed

Activities [+ Add Activity](#)

Date	Subject	Contact (Project)	Notes	Completed
3/28/2024 03:00 pm Meeting	Review Design	 Abby Mercado 4 Season's Creative Learning Center		<input type="checkbox"/>
3/29/2024 01:00 pm Meeting	Client Visit	 Chris Baumann		<input type="checkbox"/>
3/31/2024 10:30 am Meeting	Client Visit	 Thomas Tallory Highway Expansion - Blair, NE		<input type="checkbox"/>
4/1/2024 03:30 pm	Client Visit	 Tina Tallory		<input type="checkbox"/>

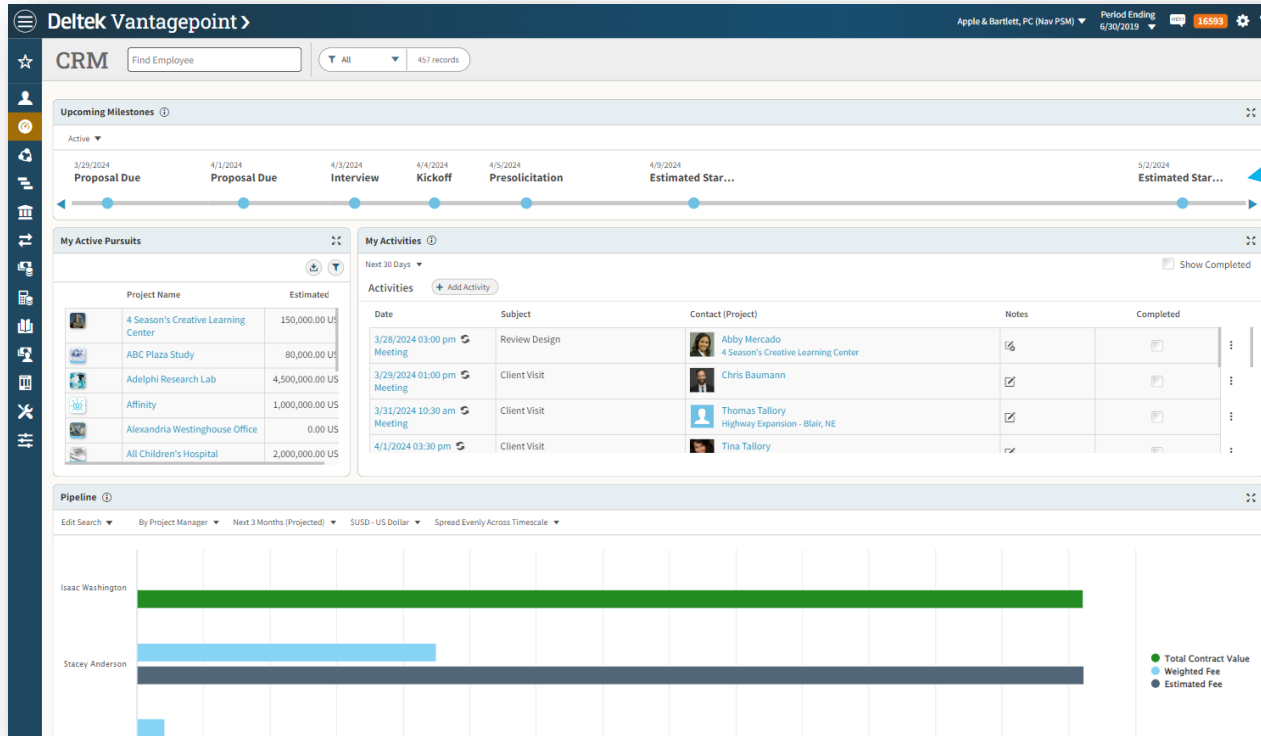
Dashboards

Multiple Dashboards



Dashboards

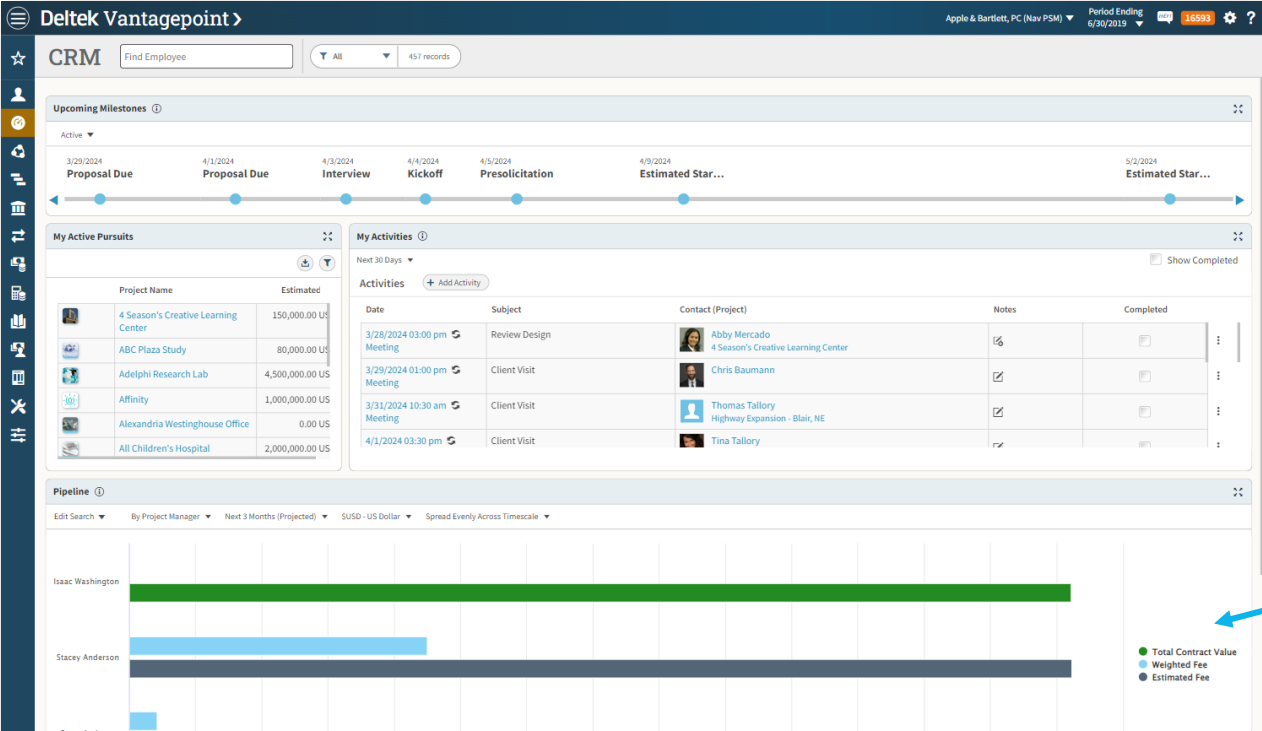
Milestone Chart



View upcoming milestones

Dashboards

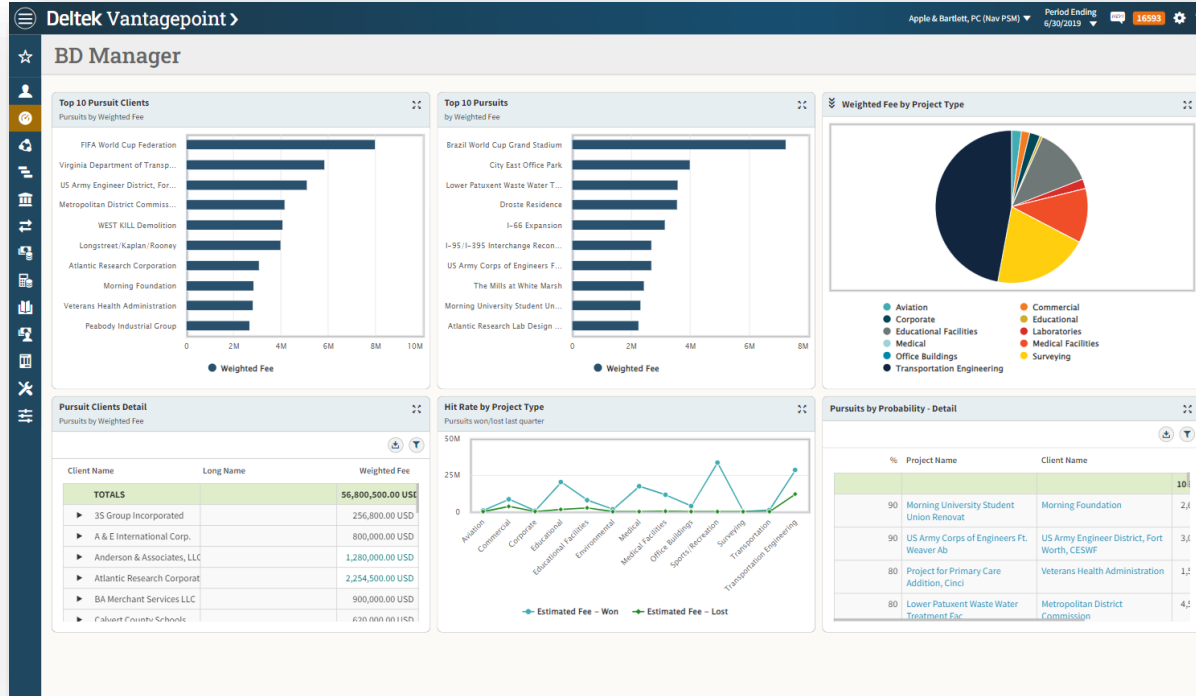
Pipeline



Interactive pipeline chart

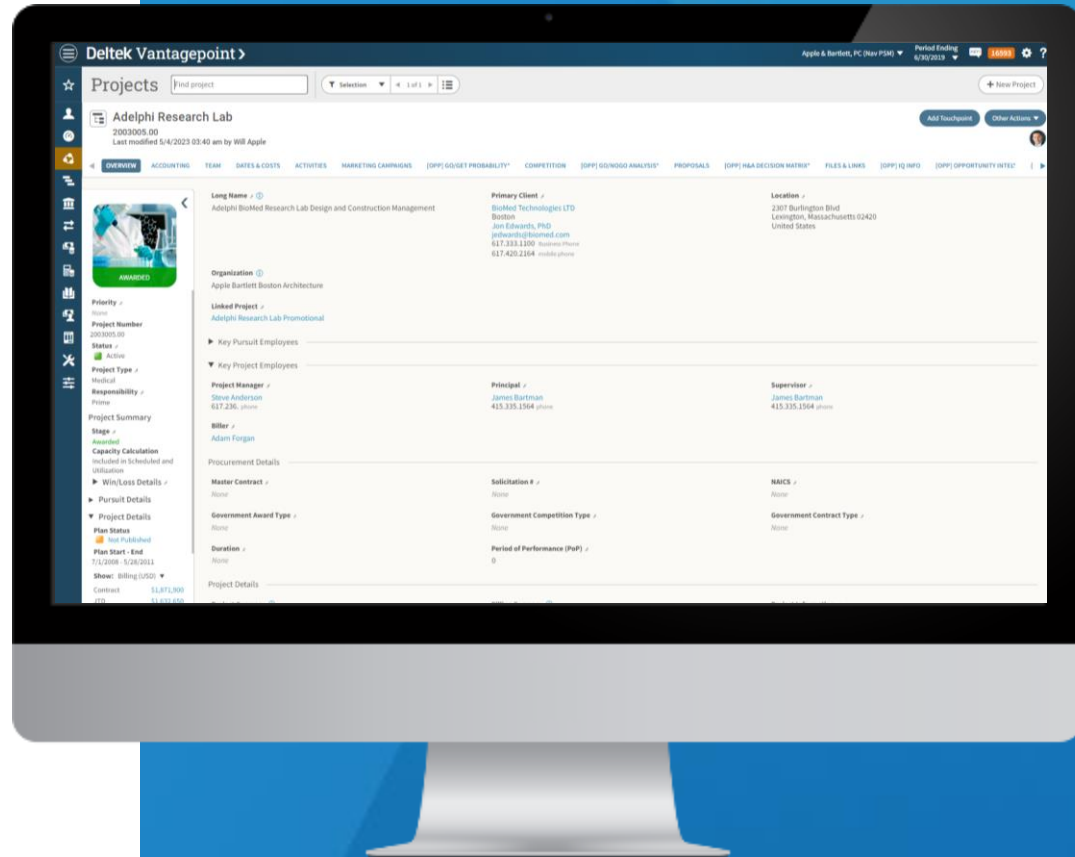
Dashboards

Endless Possibilities



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

Deltek Vantagepoint

Firms Find firm

Anderson & Associates, LLC
Last modified 9/23/2020 09:39 am by MJ McDonald

OVERVIEW ACTIVITIES ASSOCIATIONS INSURANCE **CONTACTS** OUR TEAM FILES & LINKS MACRODMMY

Contacts + Add Contact Include Contacts for Firms Lower in the

Name	Status	Title	Work Phone	Mobile Phone	Location	Email
Betty Fowler	Active	Contracts Administrator	321.234.2945	321.981.9301	Orlando Office	bfowler@anderson.com
Billy Bort	Active				<Default>	
Bob Brighton	Active				<Default>	
Bob Mendez	Active				<Default>	
Dylan Zimmerman, AIA	Active	Chief Executive Officer	713.920.7000	713.549.0537	Texas office	dzimmerman@anderson.com
George DeRosa, AIA	Active	Director of Marketing	212.549.6408	212.392.8593	<Default>	gderosa@andersonassoc.com
George Smith, III	Active	Project Manager	321.234.2933	321.549.1594	Orlando Office	gsmith@andersonassoc.com
John Katz, AIA	Active	Chief Financial Officer	212.549.6413	212.472.0821	<Default>	jjind@anderson.com

Contacts from Project Associations

Name	Project Name	Project Number	Status	Current Firm
Betty Fowler	Advanced Auto Technology	606497-03	Active	Anderson & Associates, LLC
Betty Fowler	Mirage School of the Arts	8675309.00	Active	Anderson & Associates, LLC
Betty Fowler	Santa Cruz Board Hall of Fame	9035678.00	Active	Anderson & Associates, LLC
Betty Fowler	DeFon1 Skateboards	OU81251.50	Active	Anderson & Associates, LLC
Betty Fowler	Benson Research Lab	106322-01	Active	Anderson & Associates, LLC
Betty Fowler	5 Star App Promotional	P106322.02	Active	Anderson & Associates, LLC

Reducing Duplicates

- » Select any firm and contact for Projects
- » Improved duplicate check

Firms Anderson & Associates, LLC
Last modified 9/25/2020 09:39 am by MJ Mcdonald

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Betty Fowler	Defcon1 Skateboards	06181251-50	Active	Anderson & Associates, LLC
Betty Fowler	Benson Research Lab	106322-01	Active	Anderson & Associates, LLC
Betty Fowler	5 Star App Promotional	P106322-02	Active	Anderson & Associates, LLC

Contacts Find contact 1 of 95

Enter Contact Name Below

OVERVIEW ACTIVITIES MARKETING CAMPAIGNS ASSOCIATIONS OUR TEAM FILES & LINKS PERSONAL INFORMATION FIRMS

Name First: Abby Middle: Preferred: Prefix: Title: Professional Suffix: Firm: Status: Active

Are You Looking For...
You may be creating a duplicate record. We found potential matches.
Abby Mercado
Chief Executive Officer

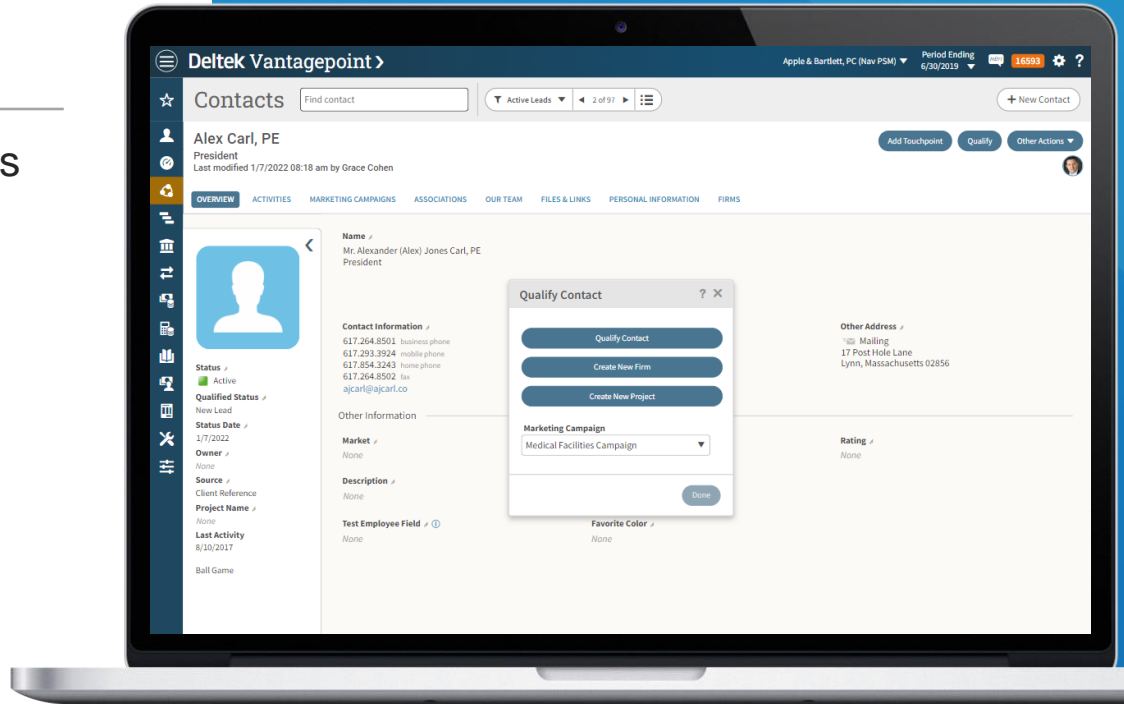
Marketing Campaigns

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

The screenshot shows a tablet displaying a web application interface for 'Marketing Campaigns'. The main heading is 'Medical Facilities Campaign', with a sub-heading 'Last modified 3/28/2024 12:46 pm by Will Apple'. The interface includes a navigation sidebar on the left with icons for home, search, and various campaign management functions. The main content area is divided into sections: 'Marketing Campaign Description' (to discover those facilities mandated for the seismic upgrades), 'Number' (M-00013), 'Project' (Medical Facilities Marketing Campaign), and 'Universe' (5,000). Below this, there are sections for 'Ownership' (Cohen Assoc Corporate Admin), 'Marketing Campaign Manager' (James Bartman), 'Marketing Manager' (Ann Johnson), and 'Marketing Coordinator' (Steve Anderson). The 'Actions' section lists 'Develop Invitation' (Current) and 'Campaign Kickoff' (Next). The 'Engagement Goal' is set to 150. A sidebar on the left provides detailed campaign information: Launch - End Date (5/1/2024 - 5/31/2024), Status (Active), Stage (Active), Type (Direct Mail), Audience (CFOs), Objective (Raise Awareness), Currency (USD - US Dollar), Exchange Rate Date (None), and Goals (Revenue Goal: \$65,000,000.00, Actual Revenue: \$12,662,352.00, Potential Revenue: \$16,170,000.55, Budget: \$20,000.00, Actual Cost: \$0.00).

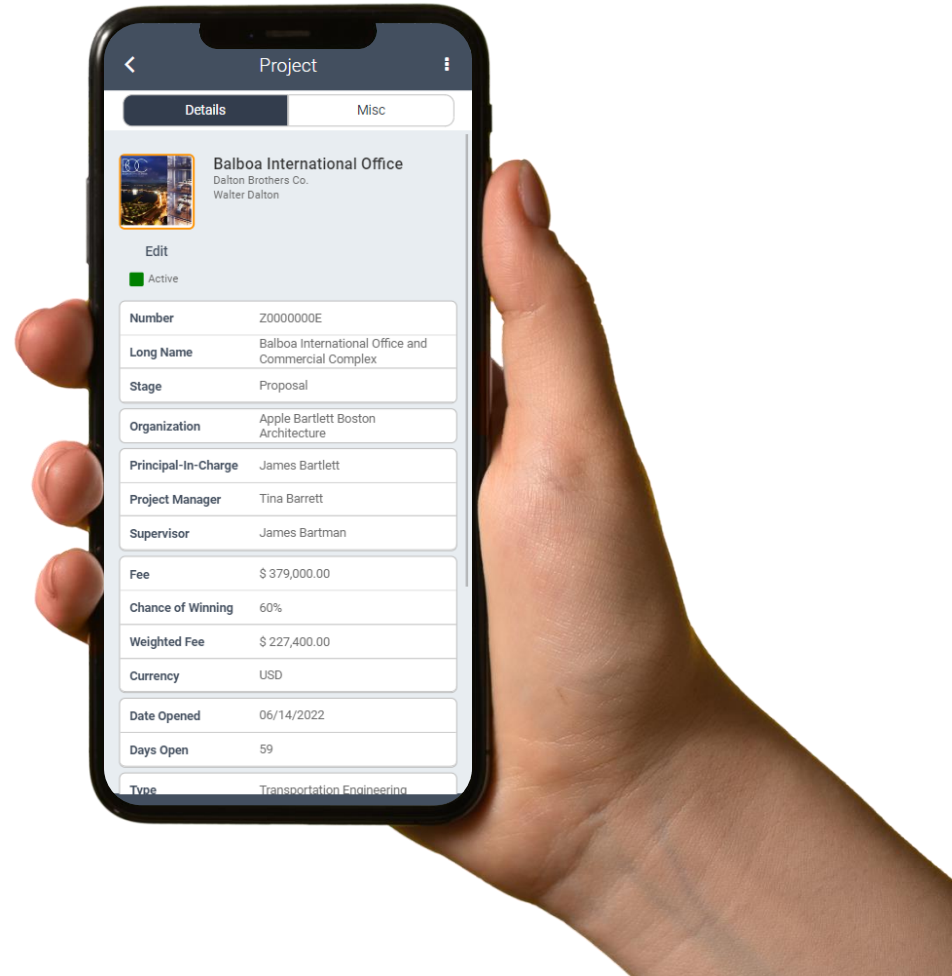
Enhanced Lead Qualification

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



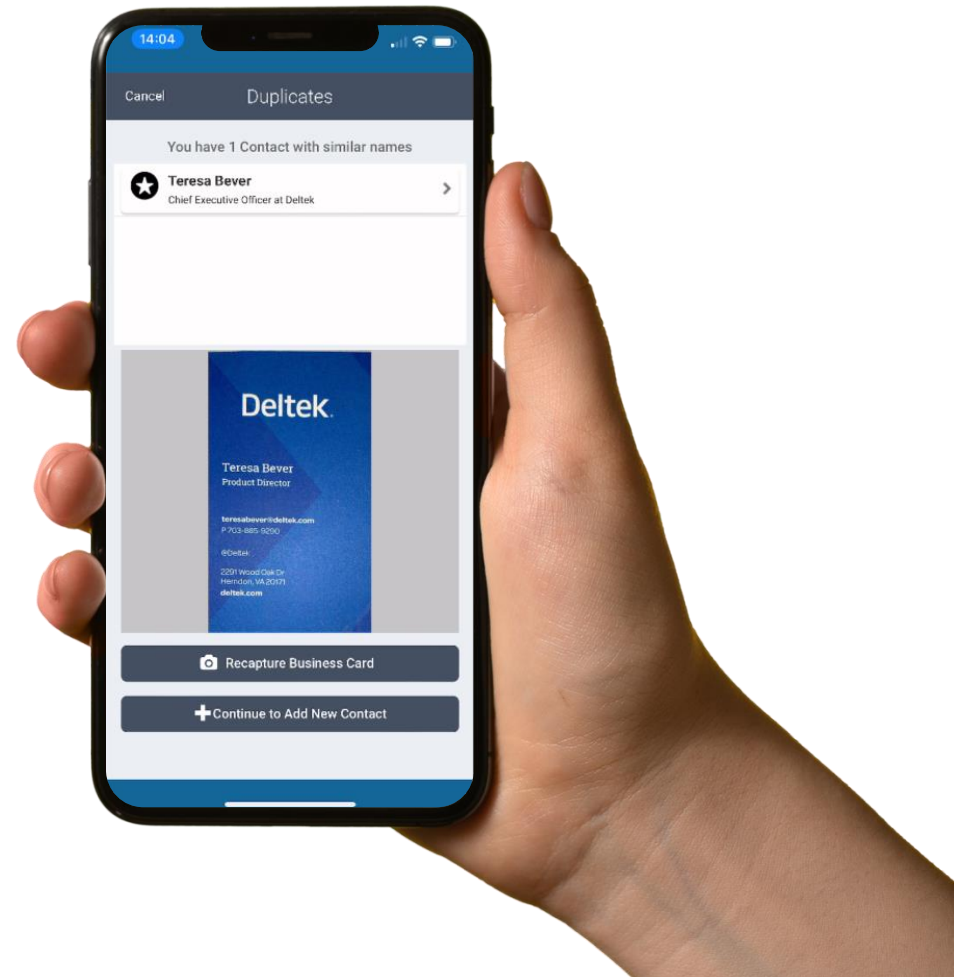
Mobile CRM Enhancements

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



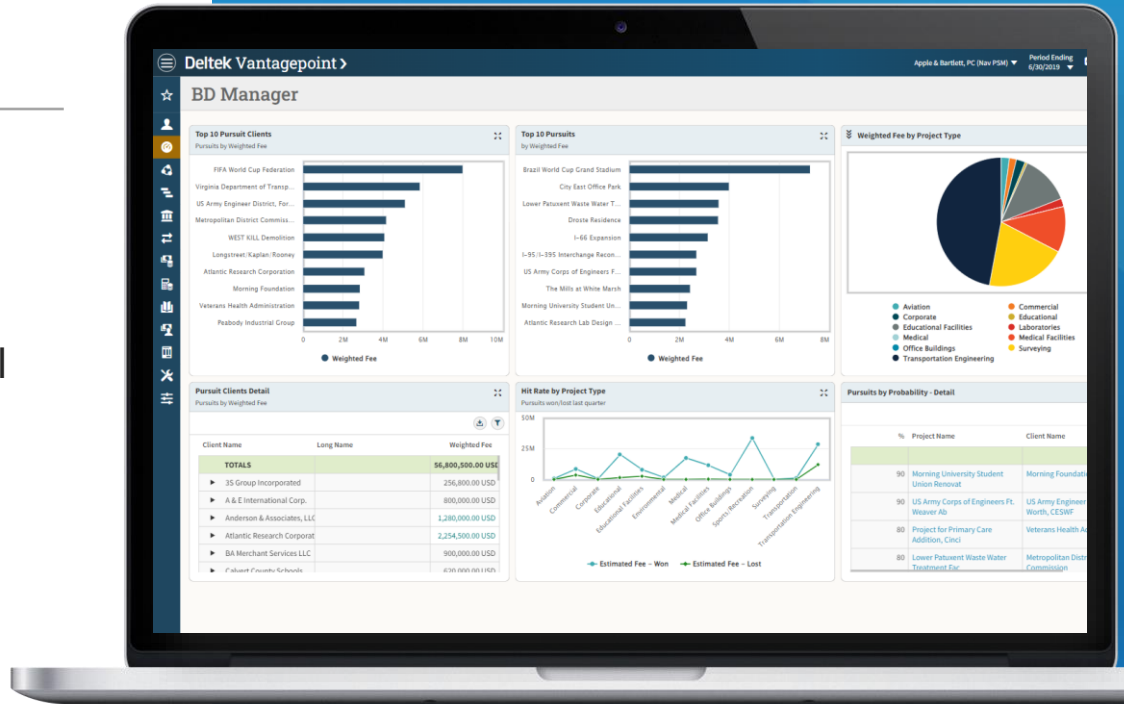
Business Card Scanner

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



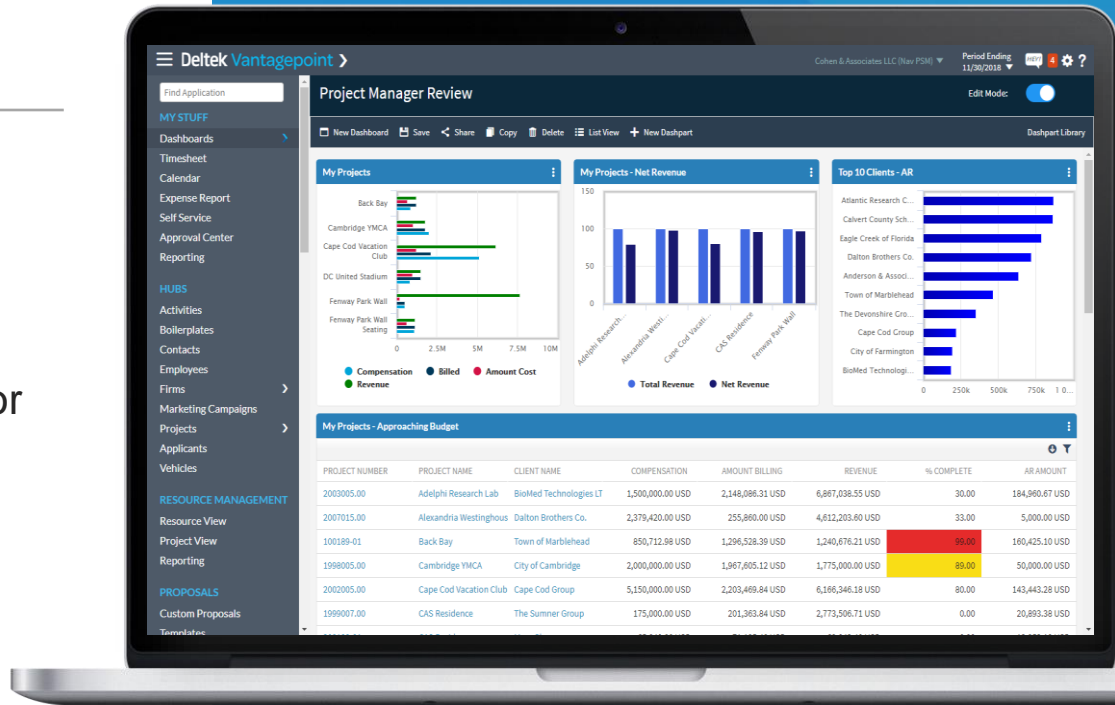
Recap

- » 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



Deltek.

Thank You!

vantagepoint@deltek.com

