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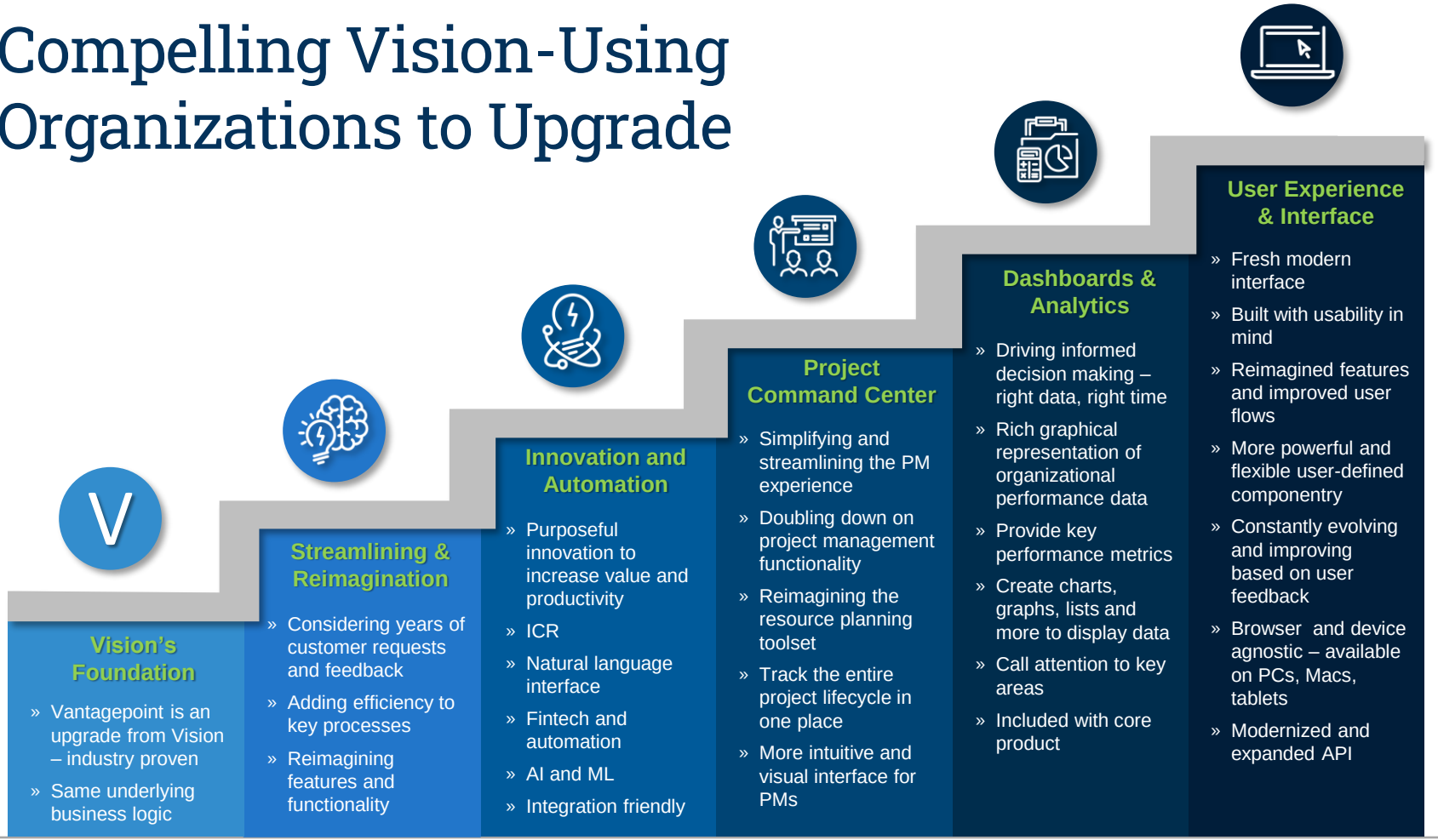
Why Vantagepoint?

CRM and Proposals

Teresa Bever
Product Director

Compelling Vision-Using Organizations to Upgrade



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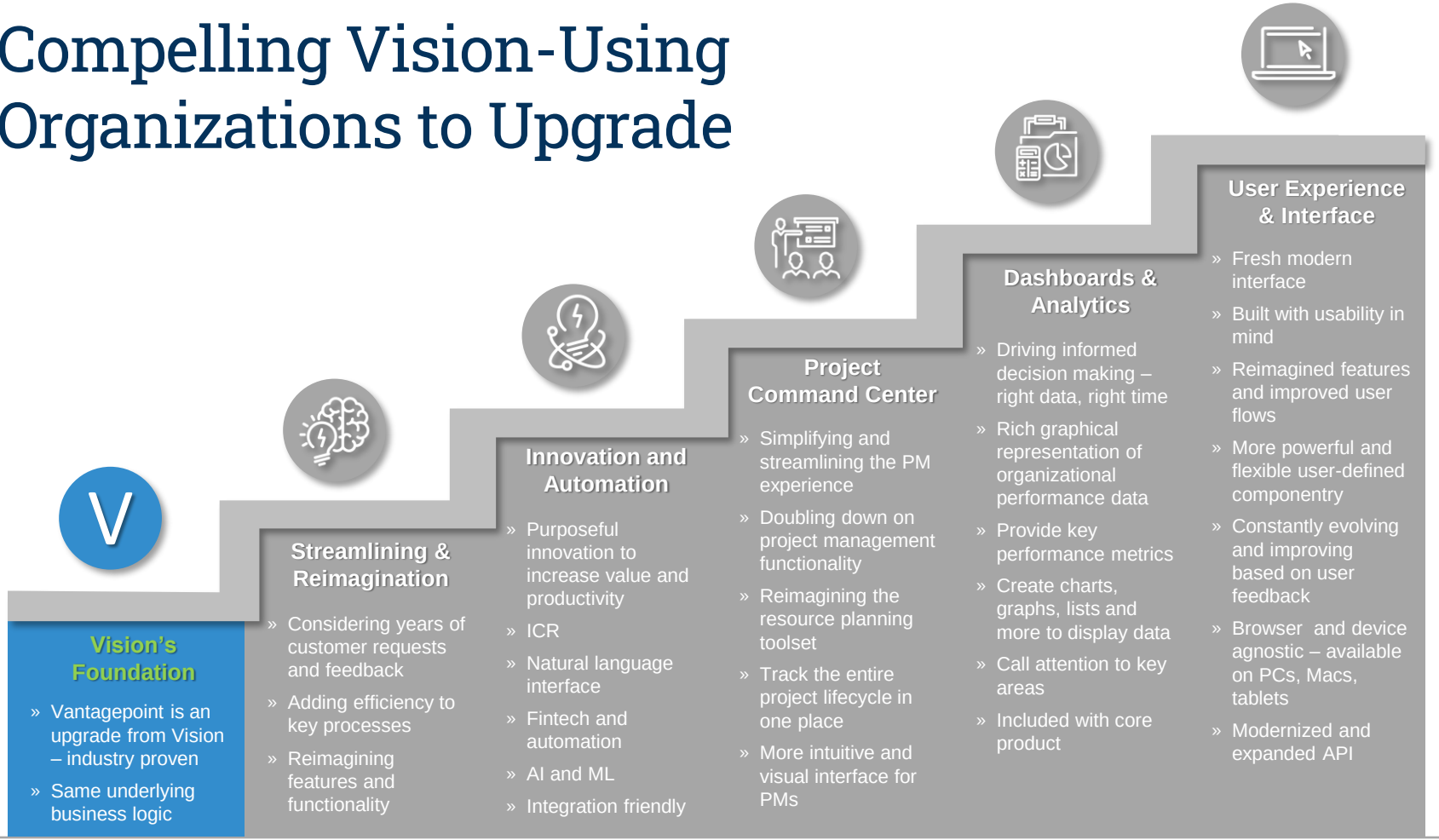
Compelling Vision-Using Organizations to Upgrade



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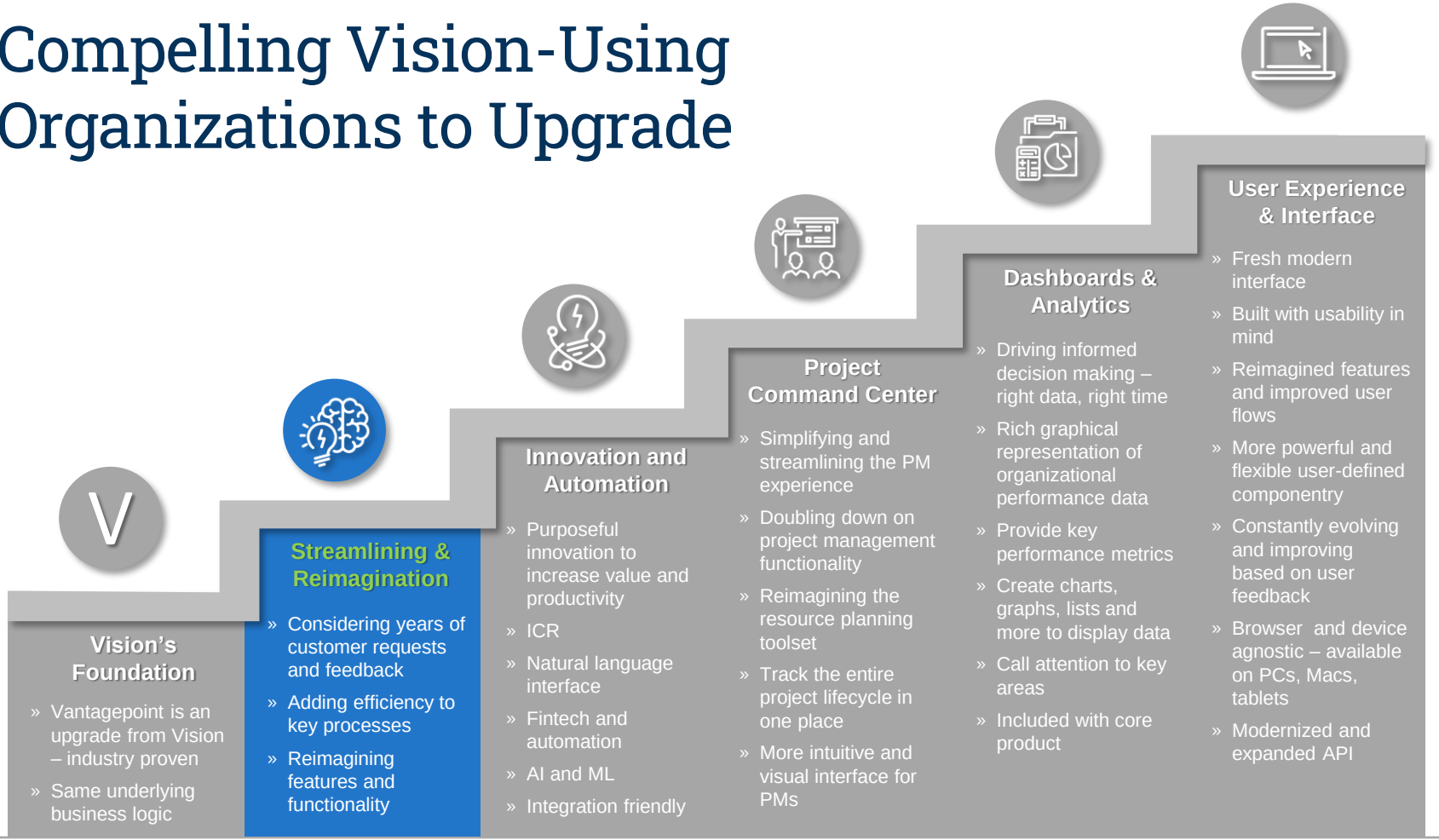
Compelling Vision-Using Organizations to Upgrade



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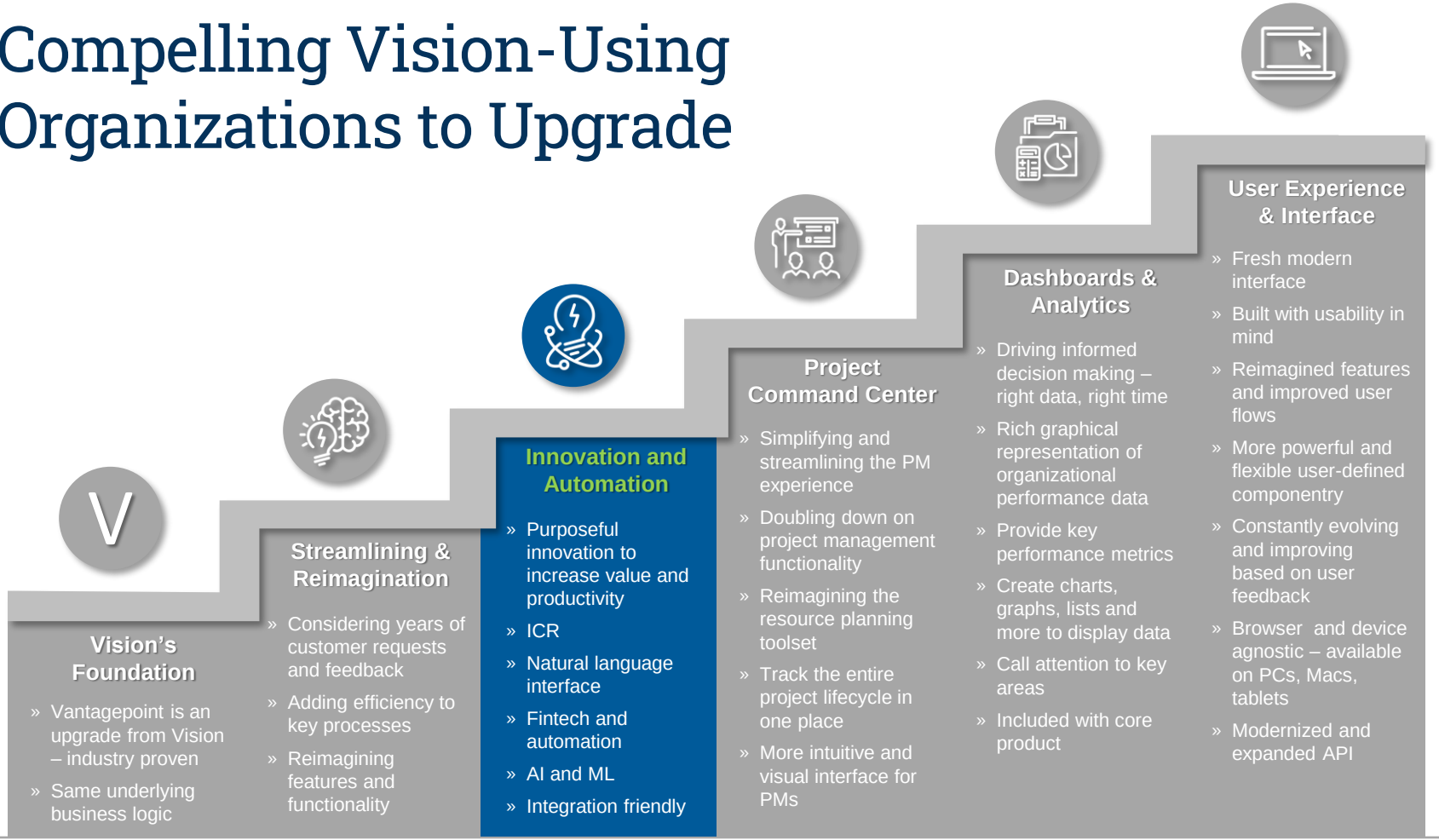

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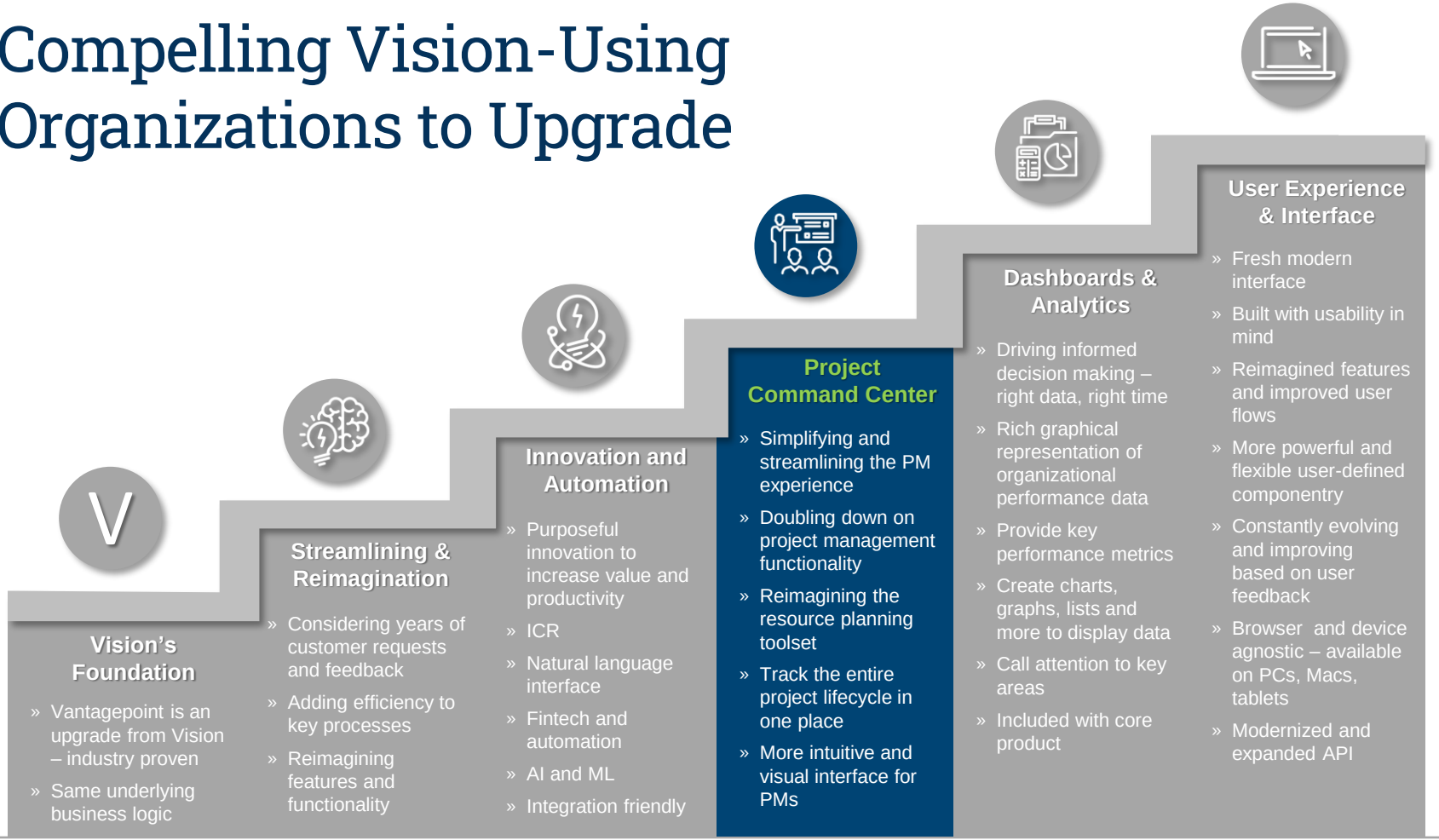

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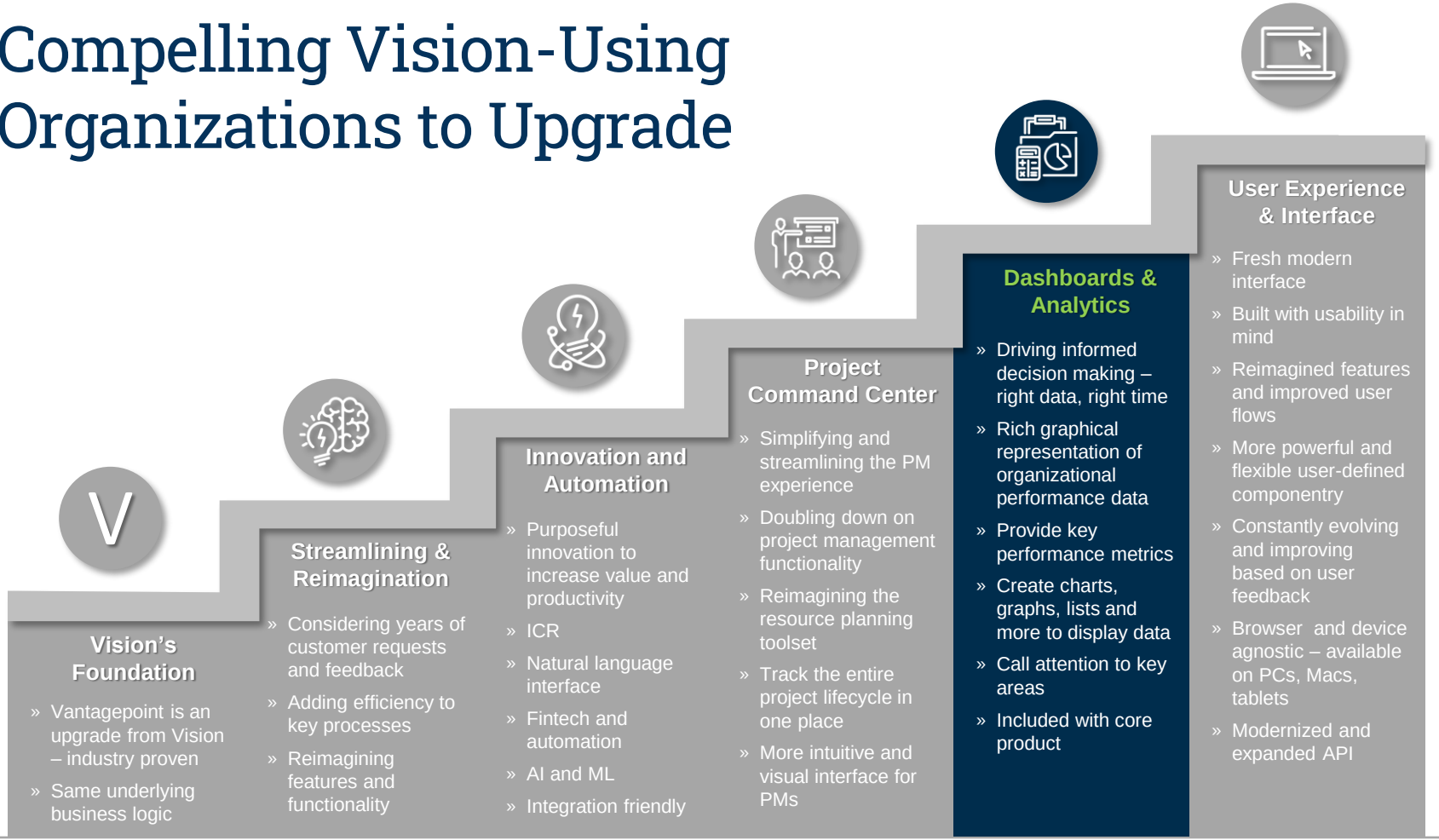
Compelling Vision-Using Organizations to Upgrade



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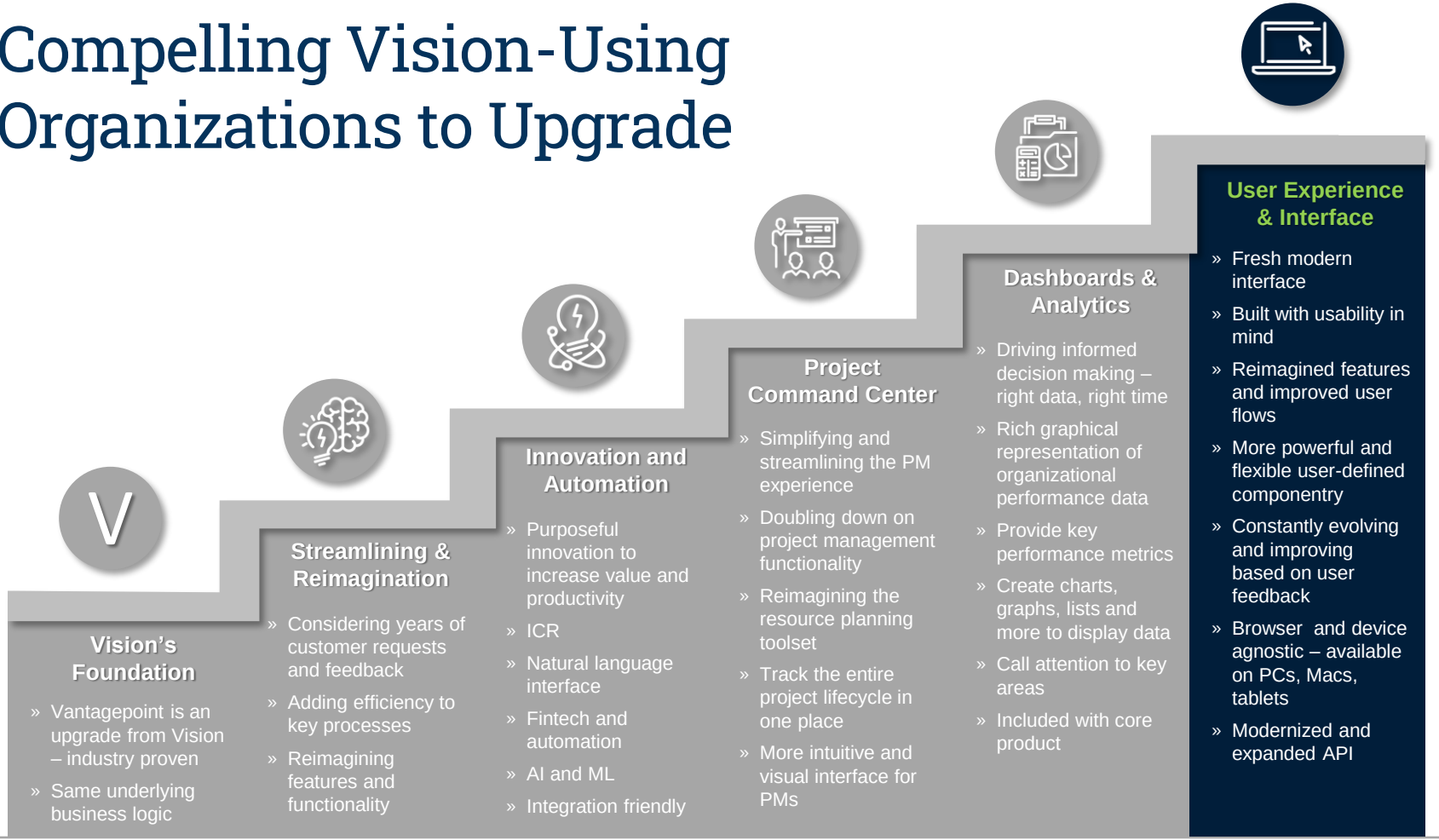
Compelling Vision-Using Organizations to Upgrade



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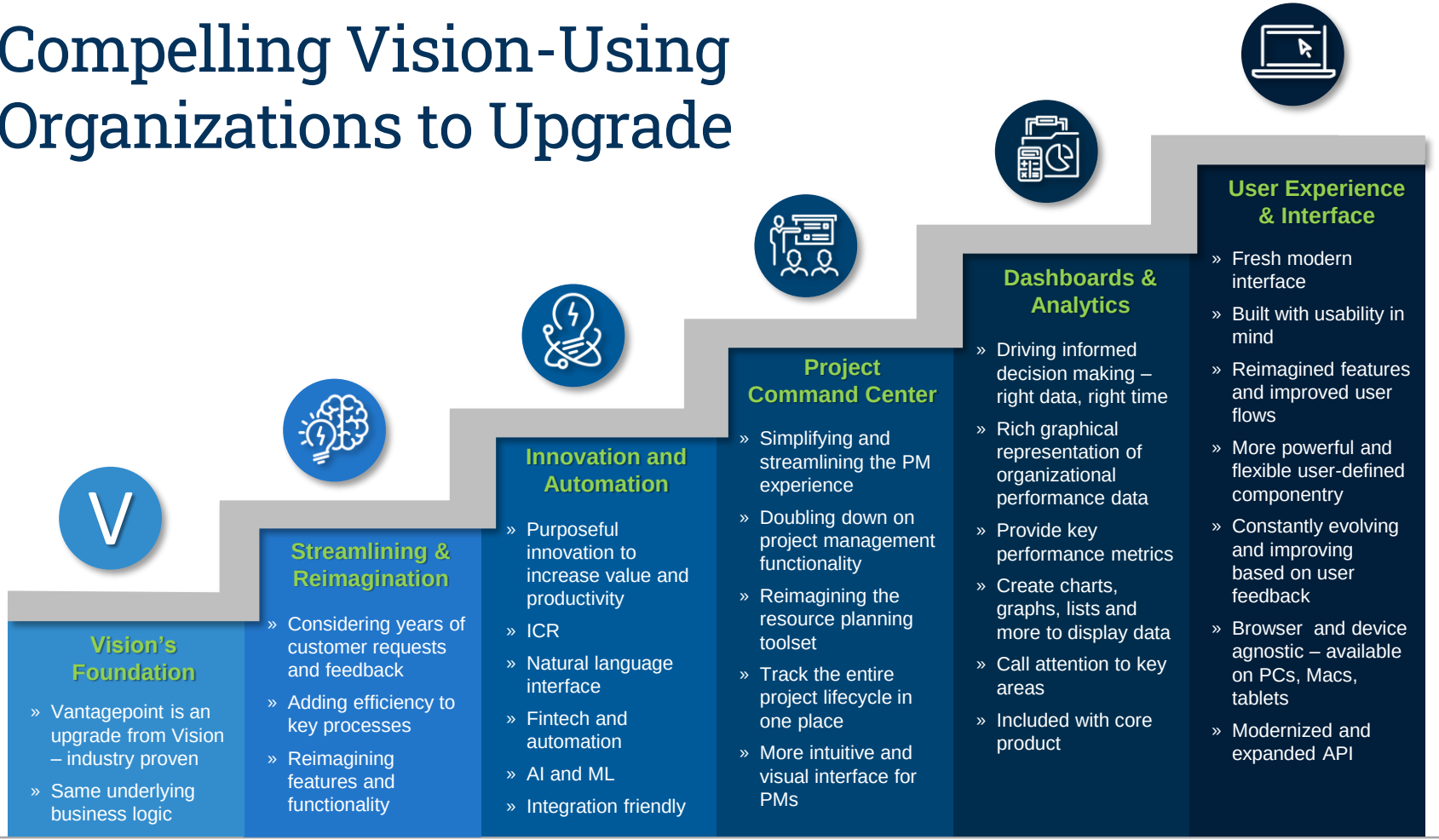
Compelling Vision-Using Organizations to Upgrade



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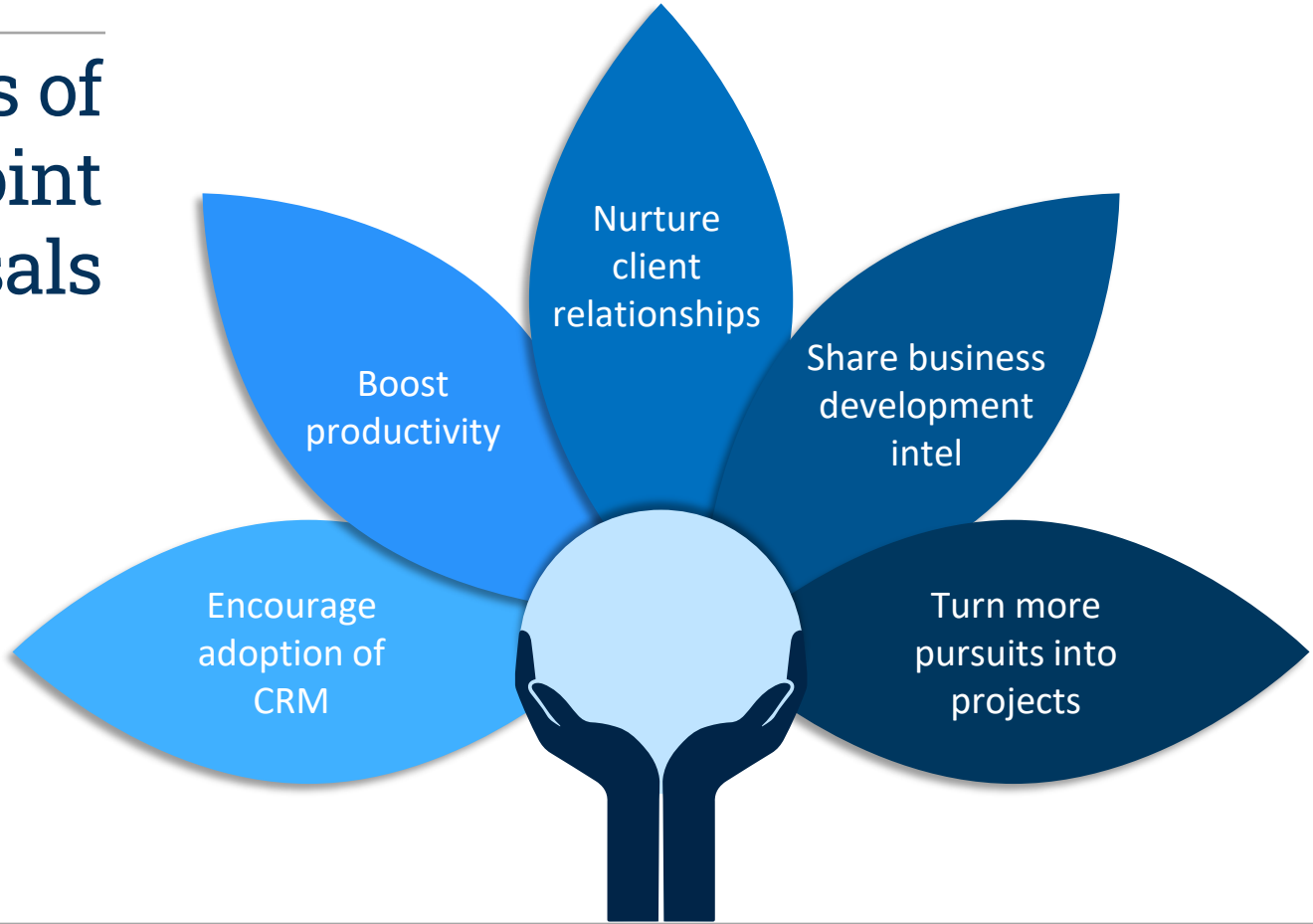
Benefits of Vantagepoint CRM & Proposals



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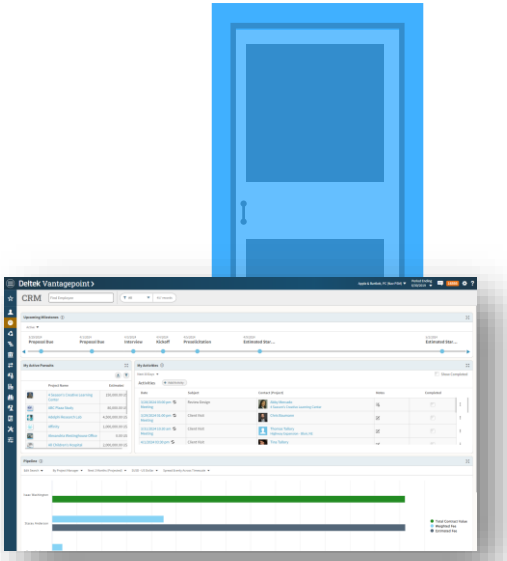
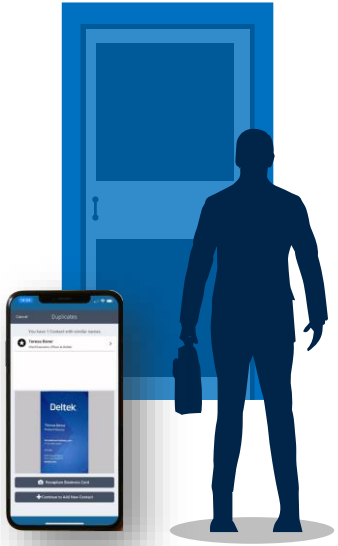
Manage Business Development from Anywhere

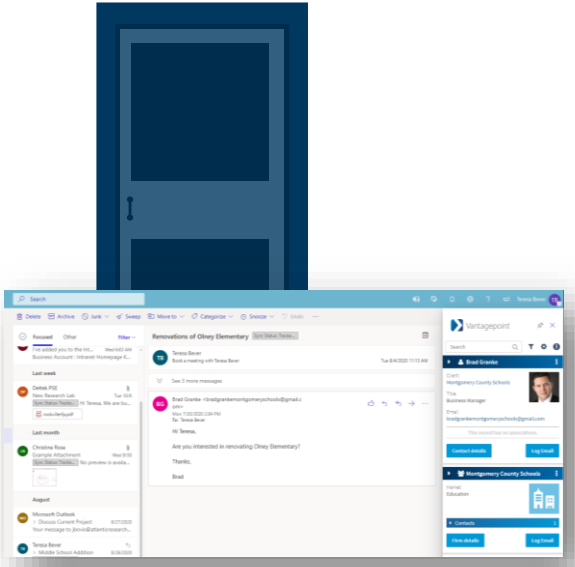
Vantagepoint Browser



Mobile CRM



Vantagepoint Connect



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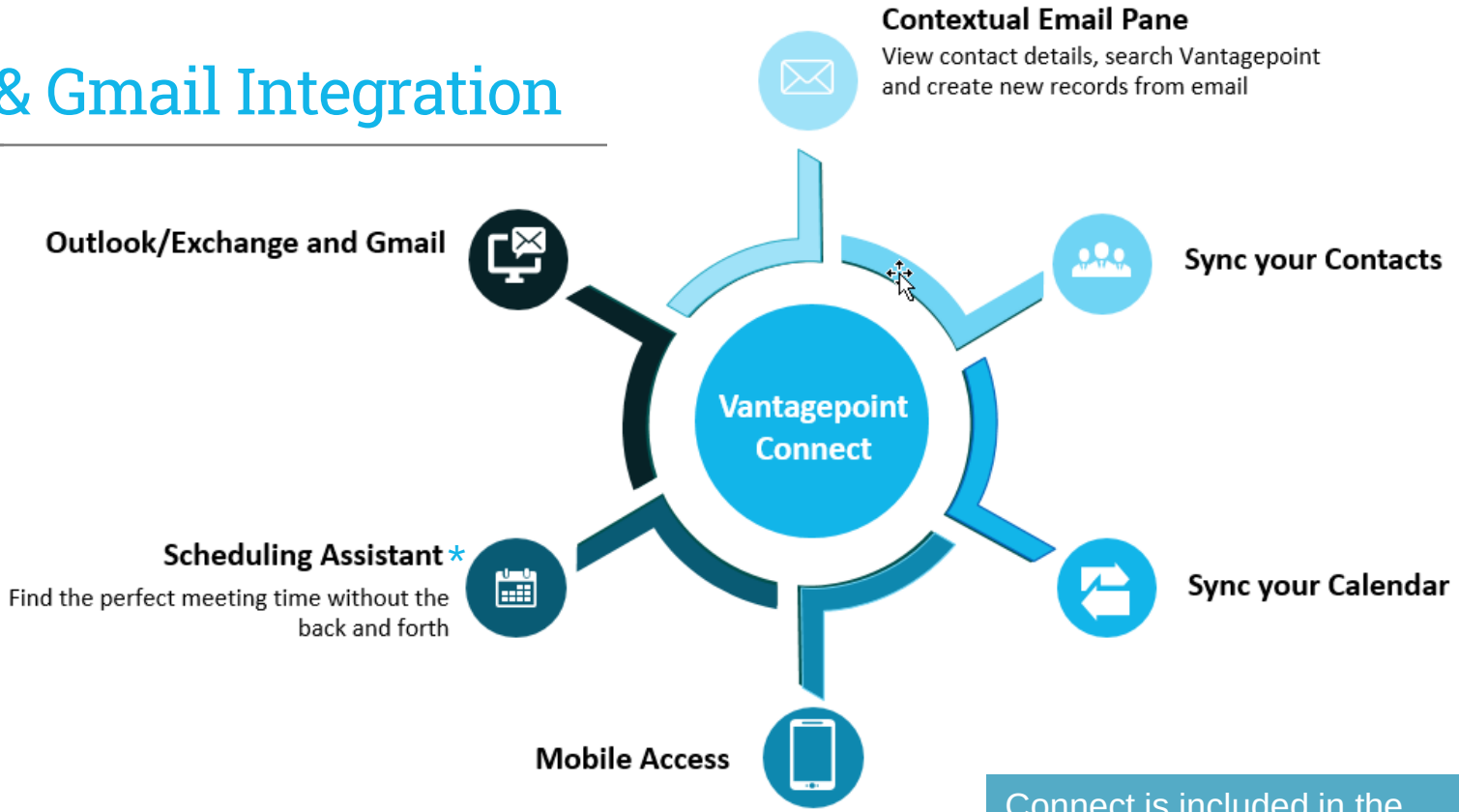
Connect
Outlook & Gmail Integration



Connect is included in the CRM module

* Scheduling assistant only available in Outlook

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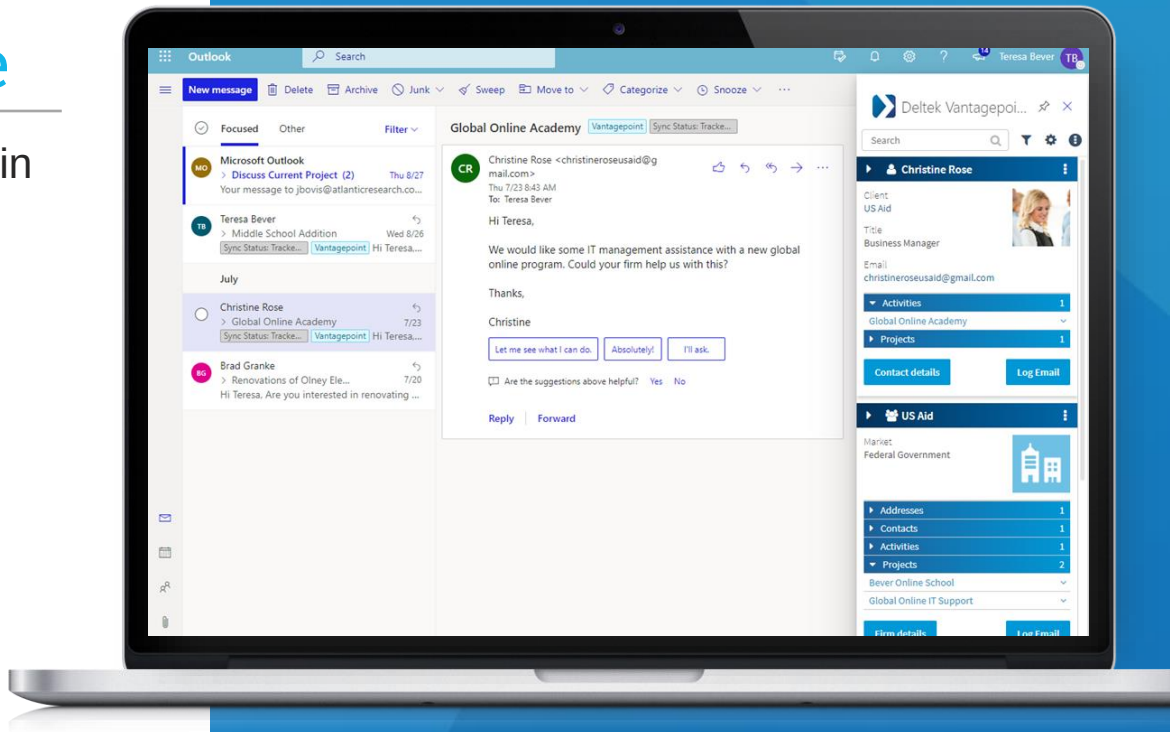
Connect
Contextual Email Pane

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



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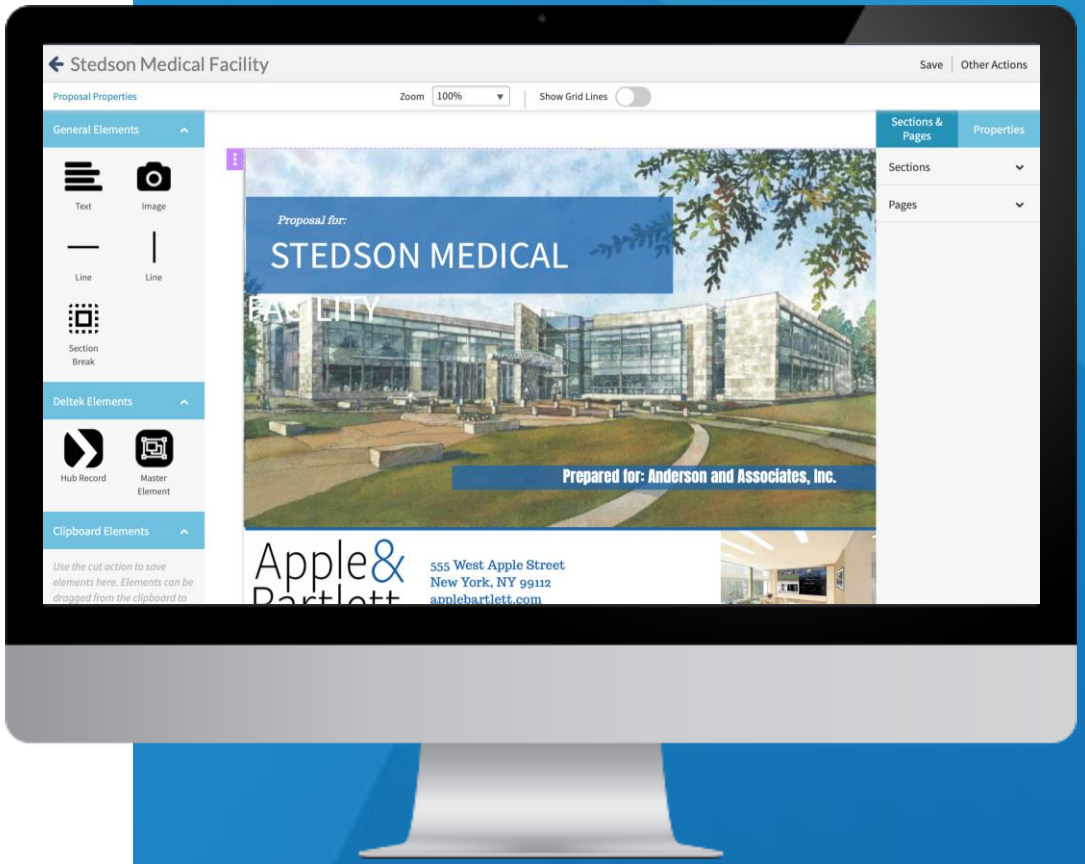
Proposal Builder

- 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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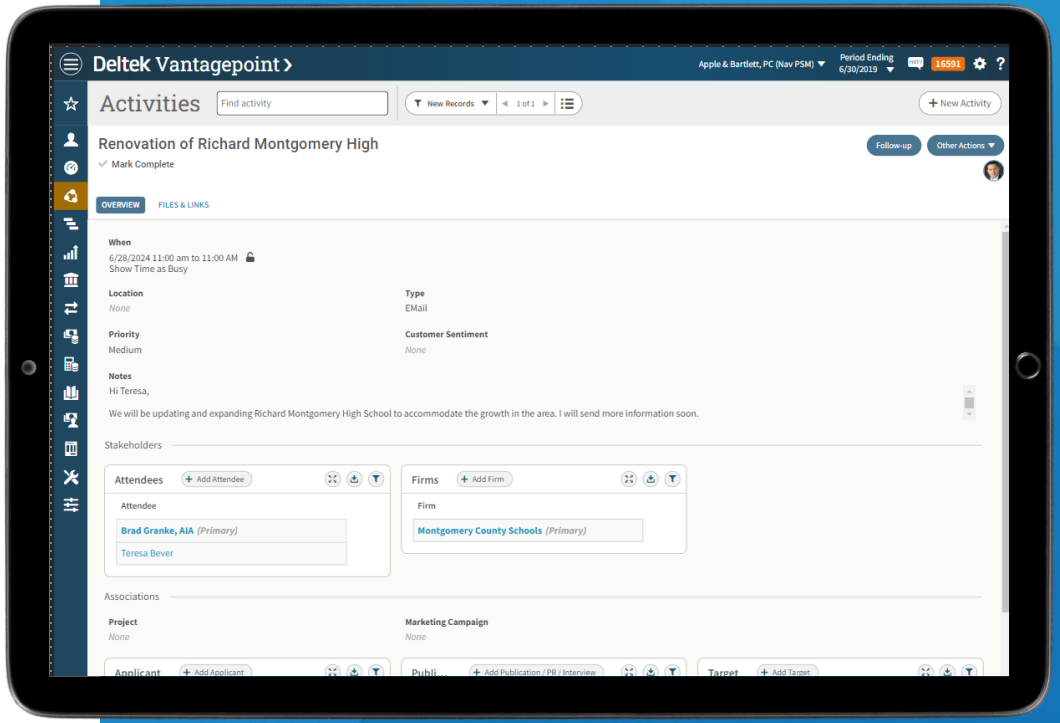
Activity Enhancements

- Simplified activity form
- Links & attachments
- Multiple firms



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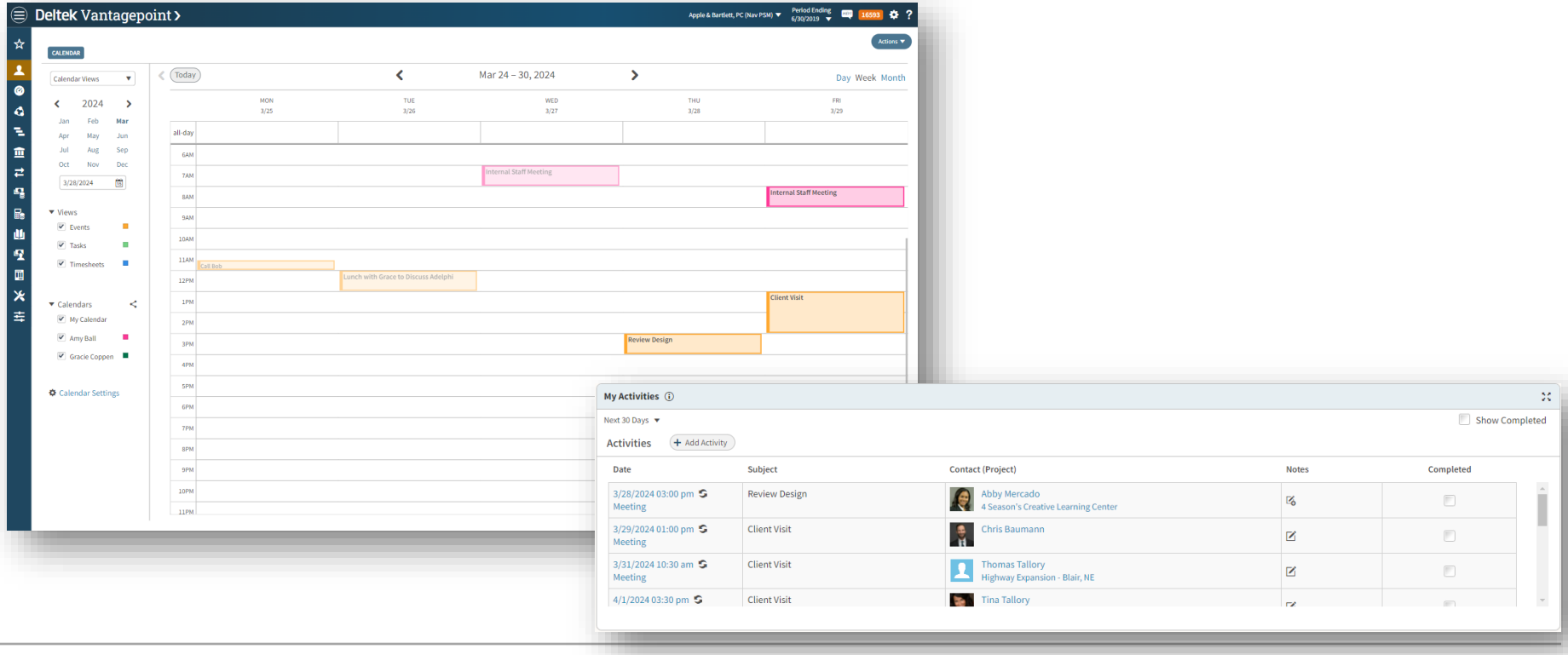
Activities

Calendar and Dashboard



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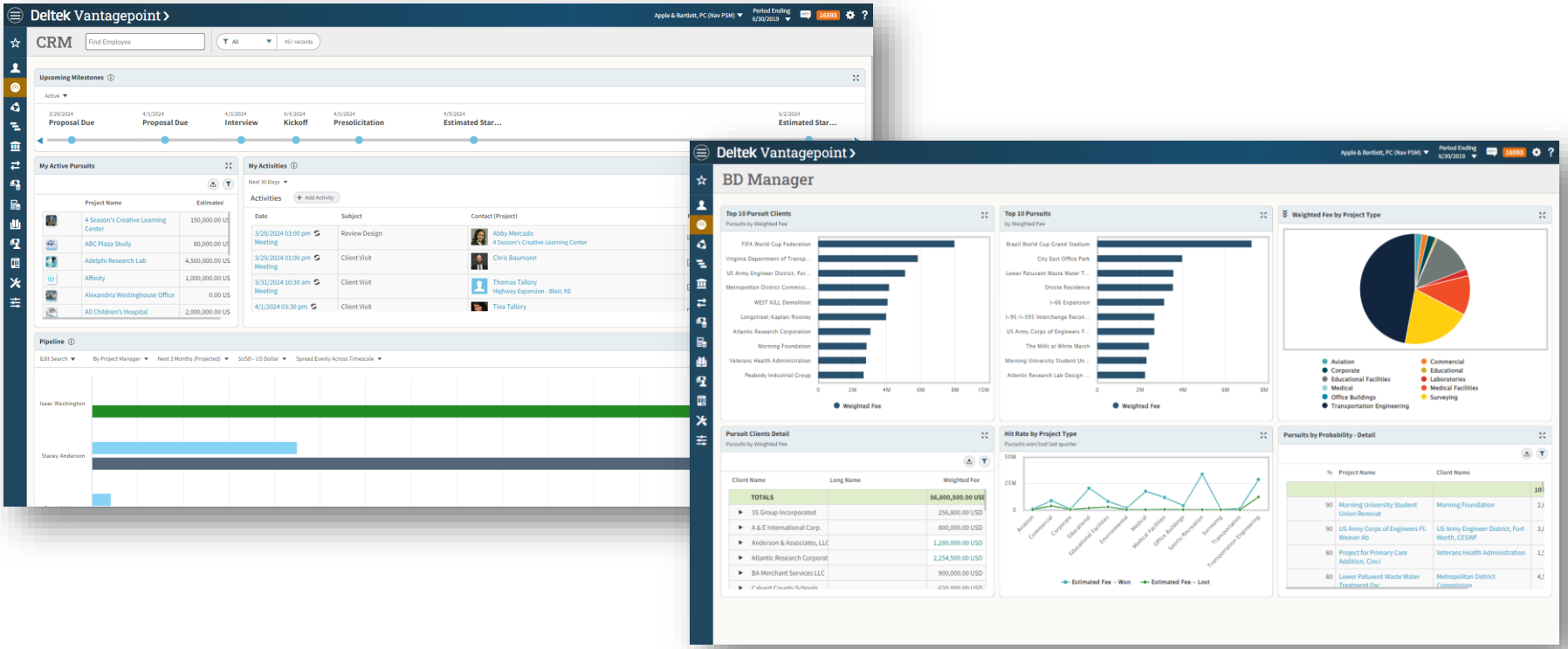
Dashboards
Multiple Dashboards



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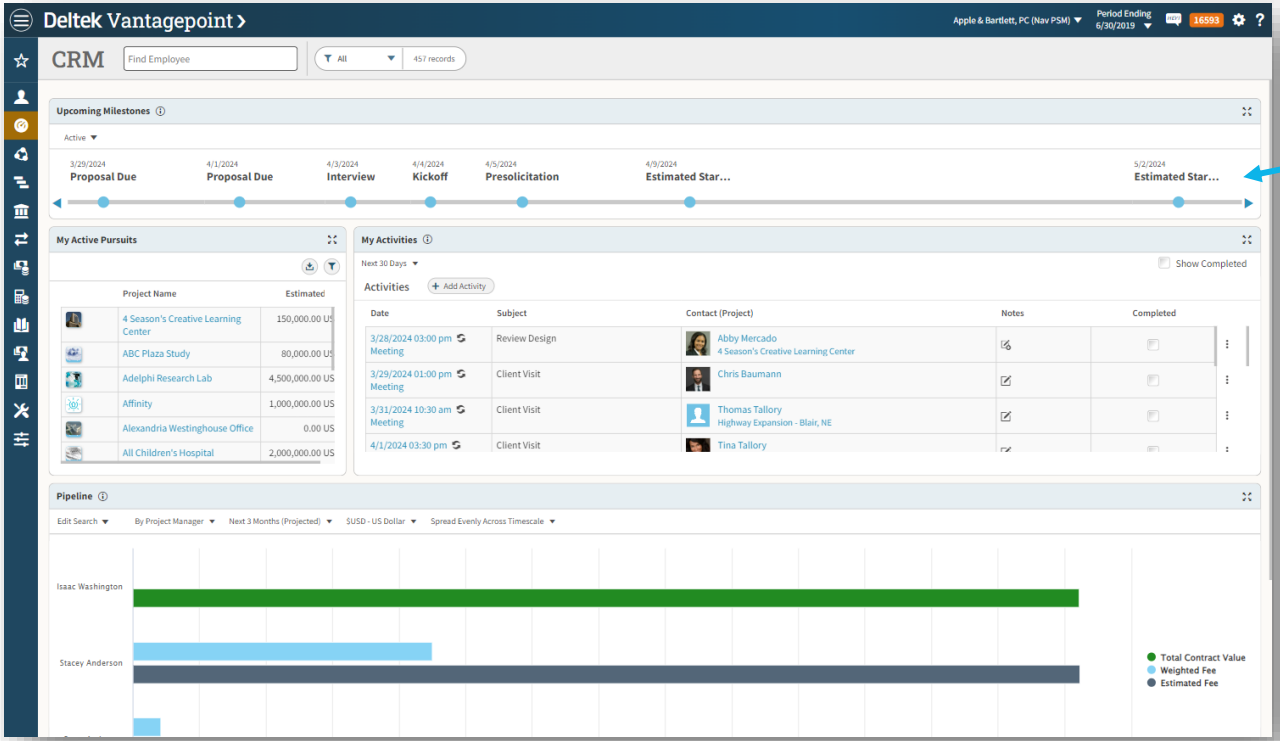
Dashboards
Milestone Chart



View upcoming milestones

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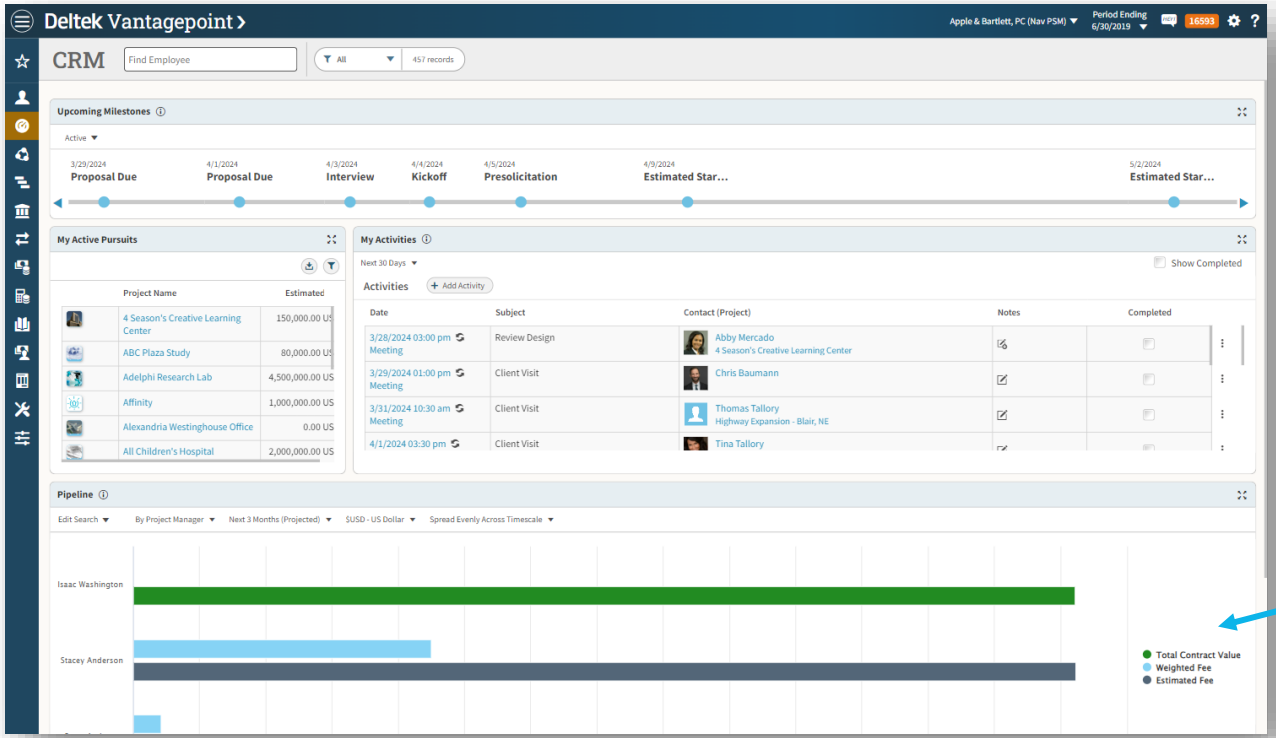
Dashboards
Pipeline



Interactive pipeline chart

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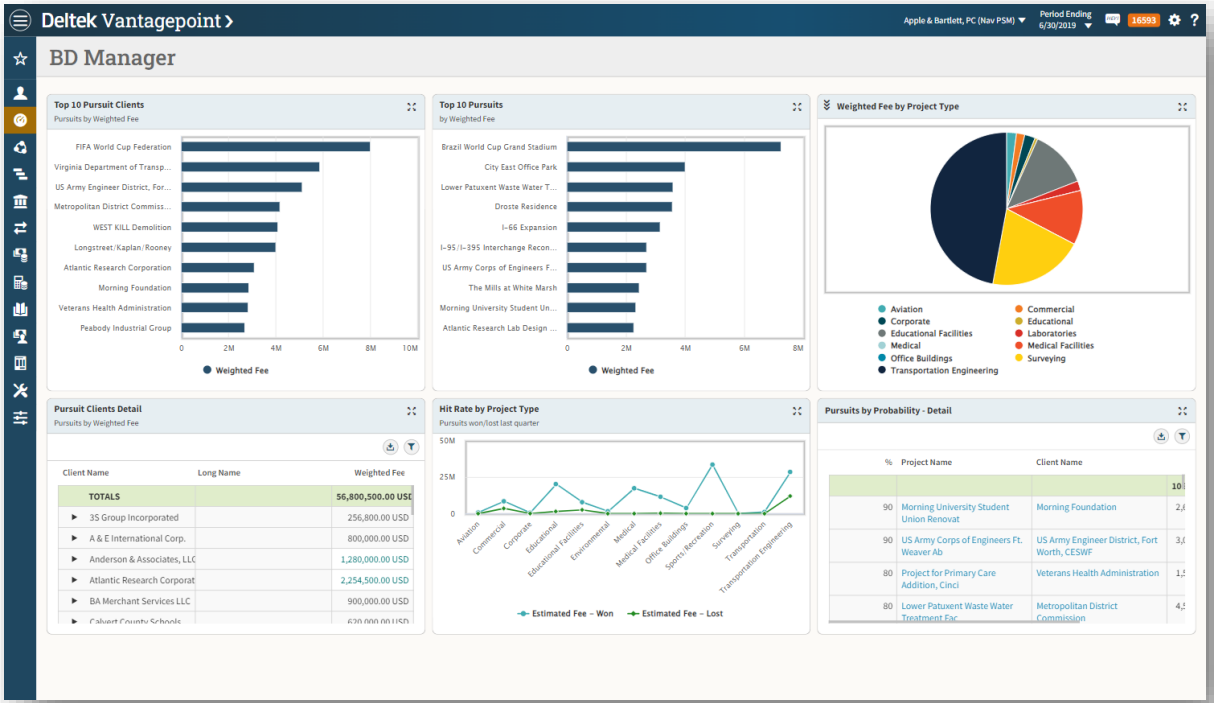
Dashboards
Endless Possibilities



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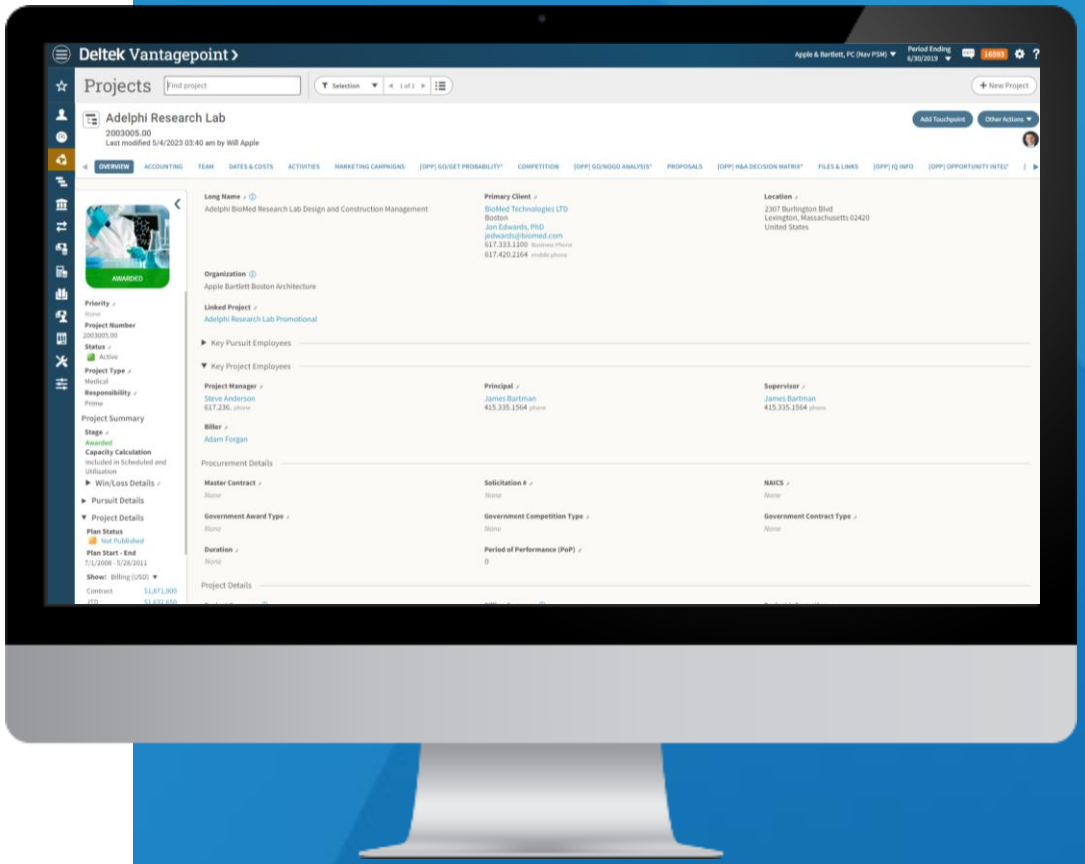
Streamlined Projects

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



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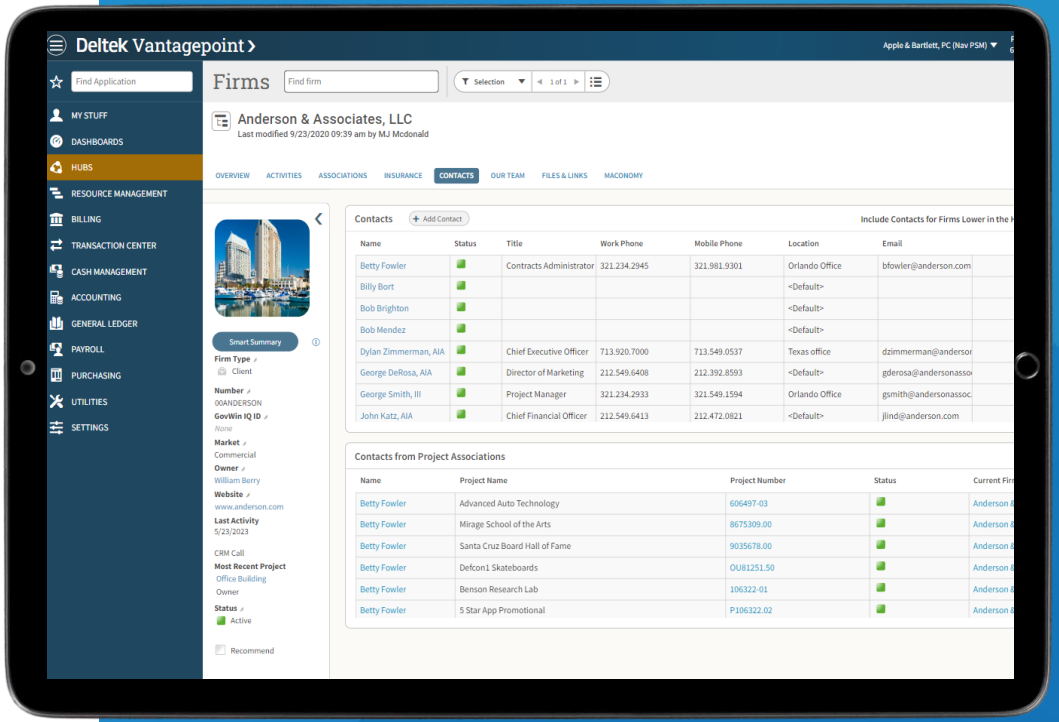
Firms

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



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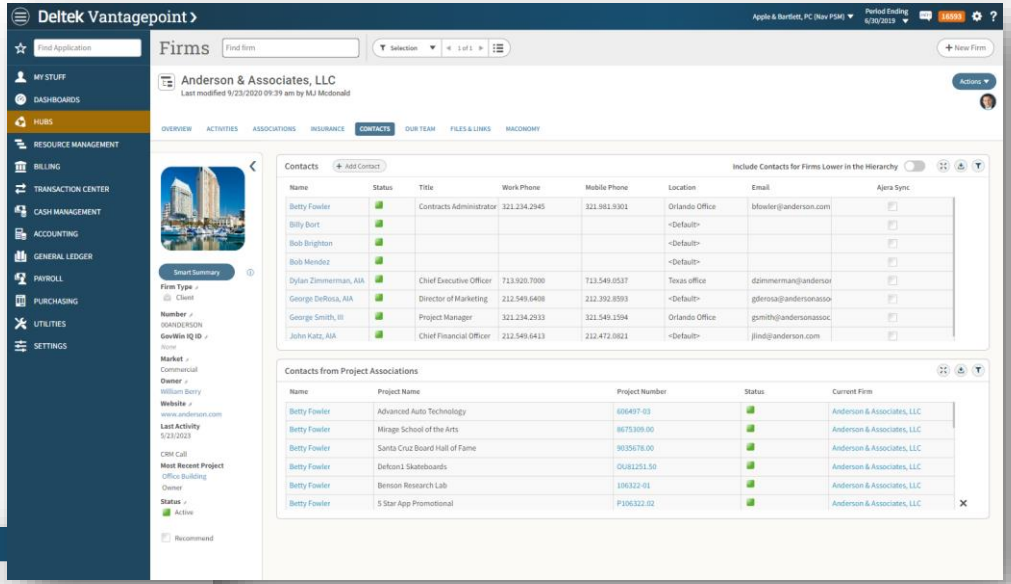
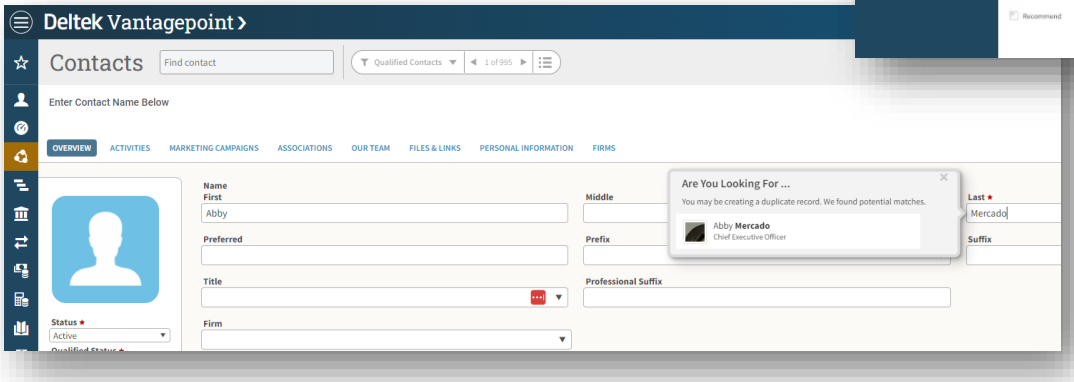
Reducing Duplicates

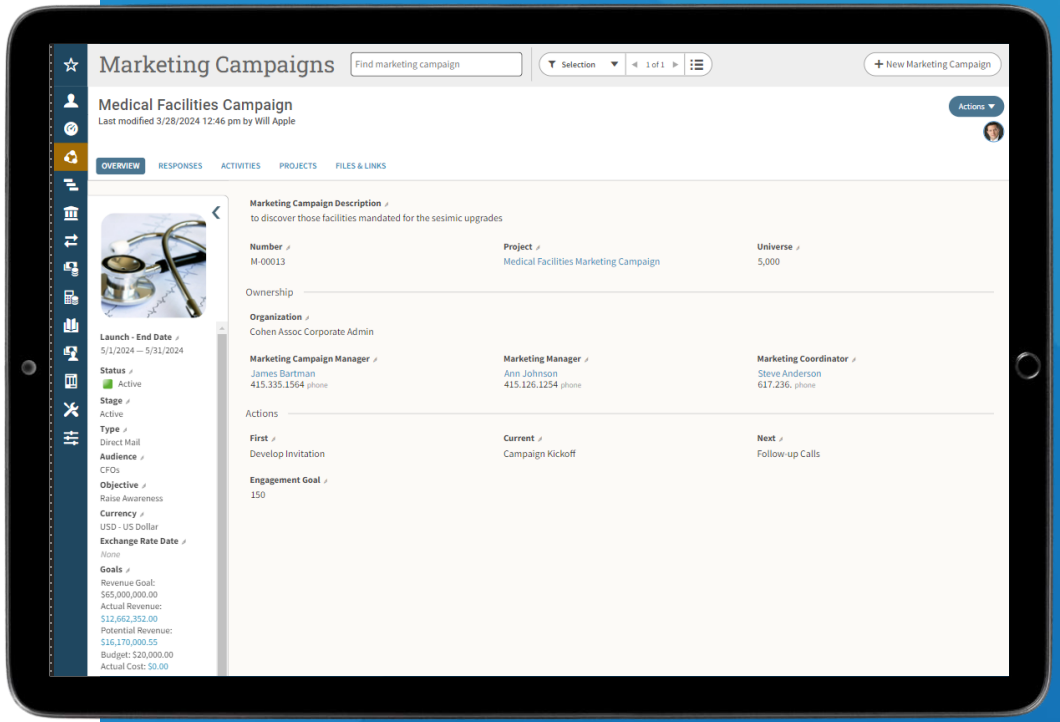
- Select any firm and contact for Projects
- Improved duplicate check





Marketing Campaigns

- New calculations
  - Actual Revenue
  - Potential Revenue



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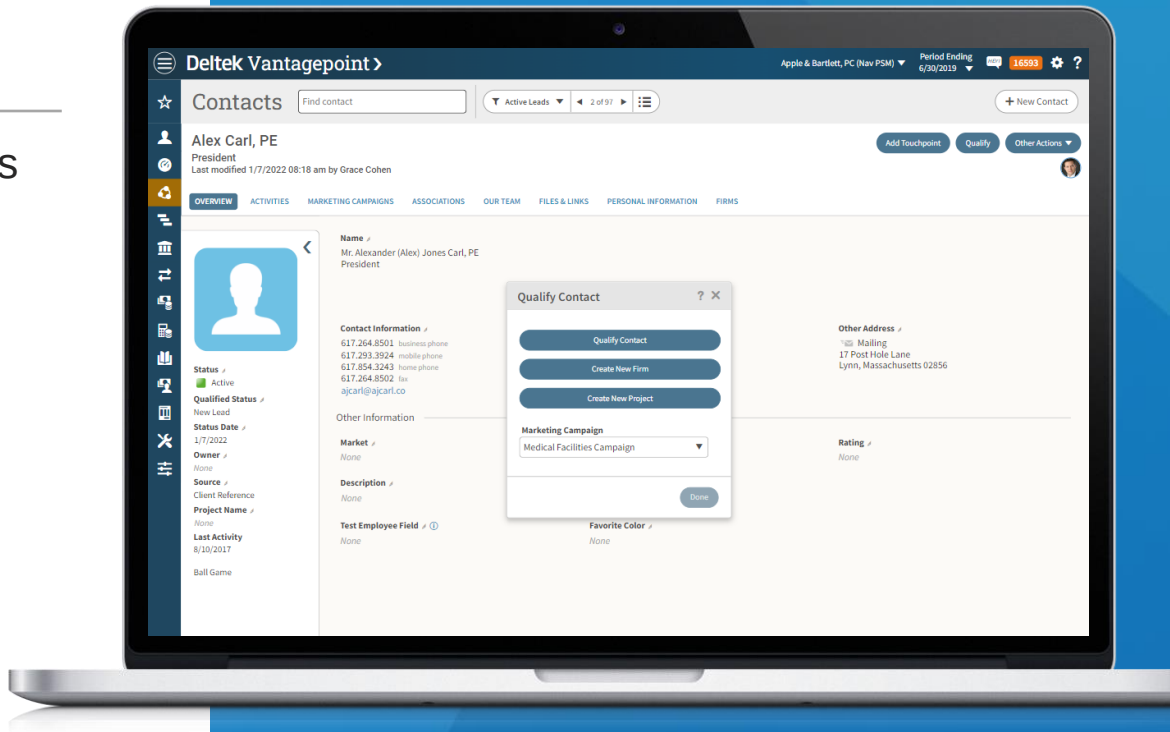
Enhanced Lead Qualification

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



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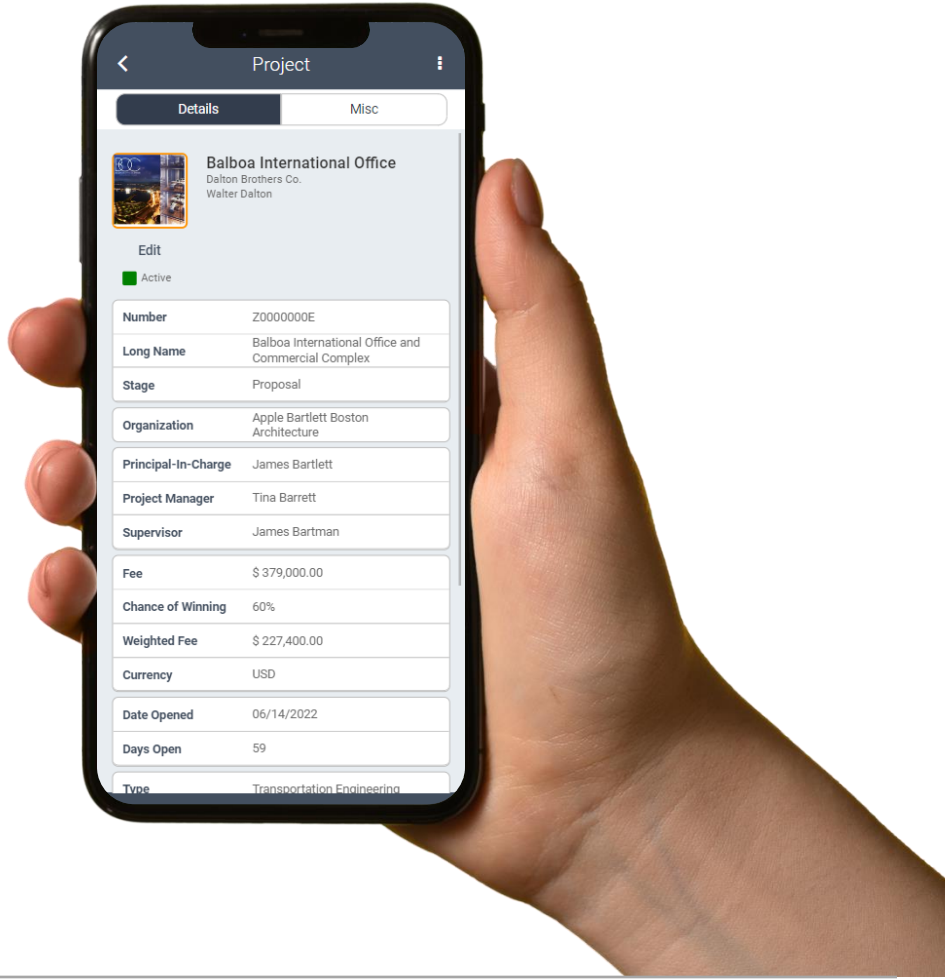
Mobile CRM Enhancements

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



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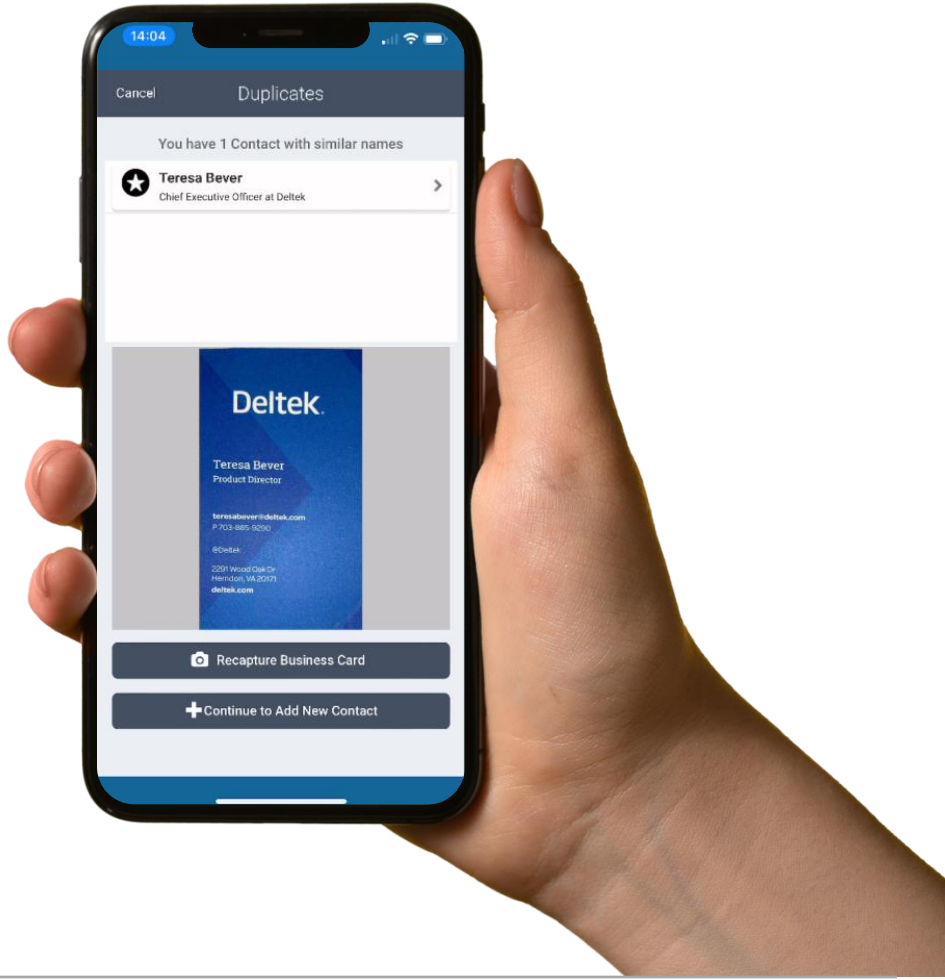
Business Card Scanner

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



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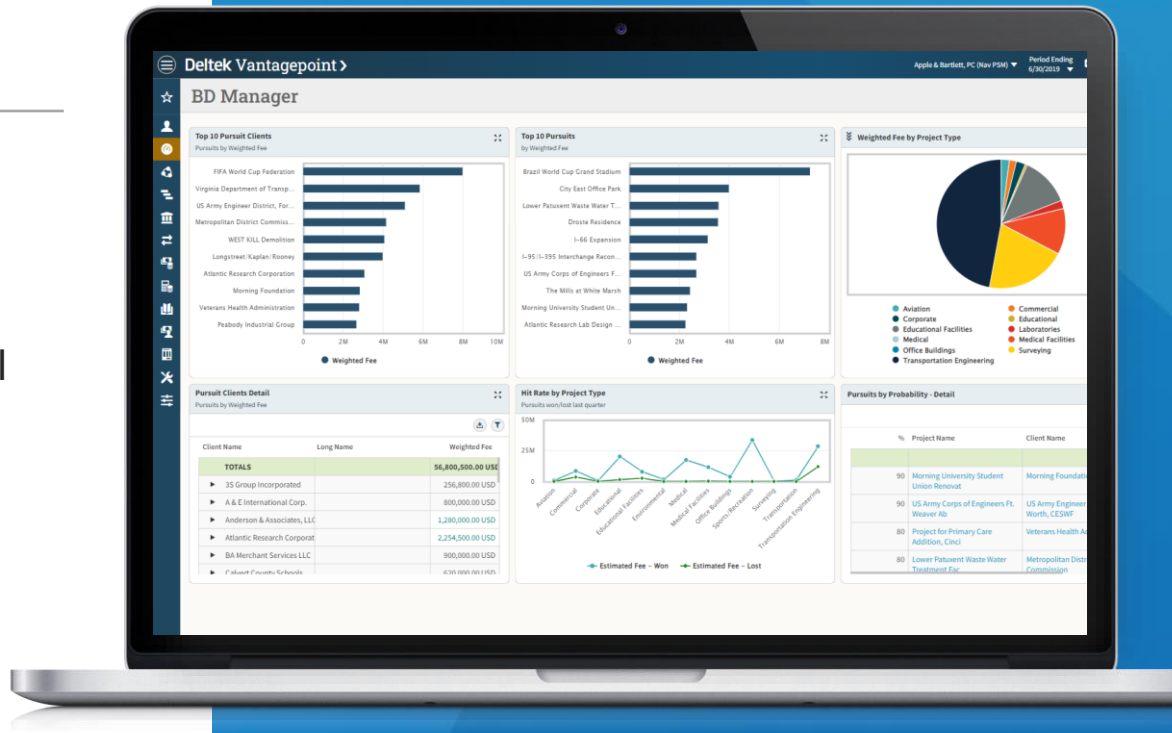
Recap

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



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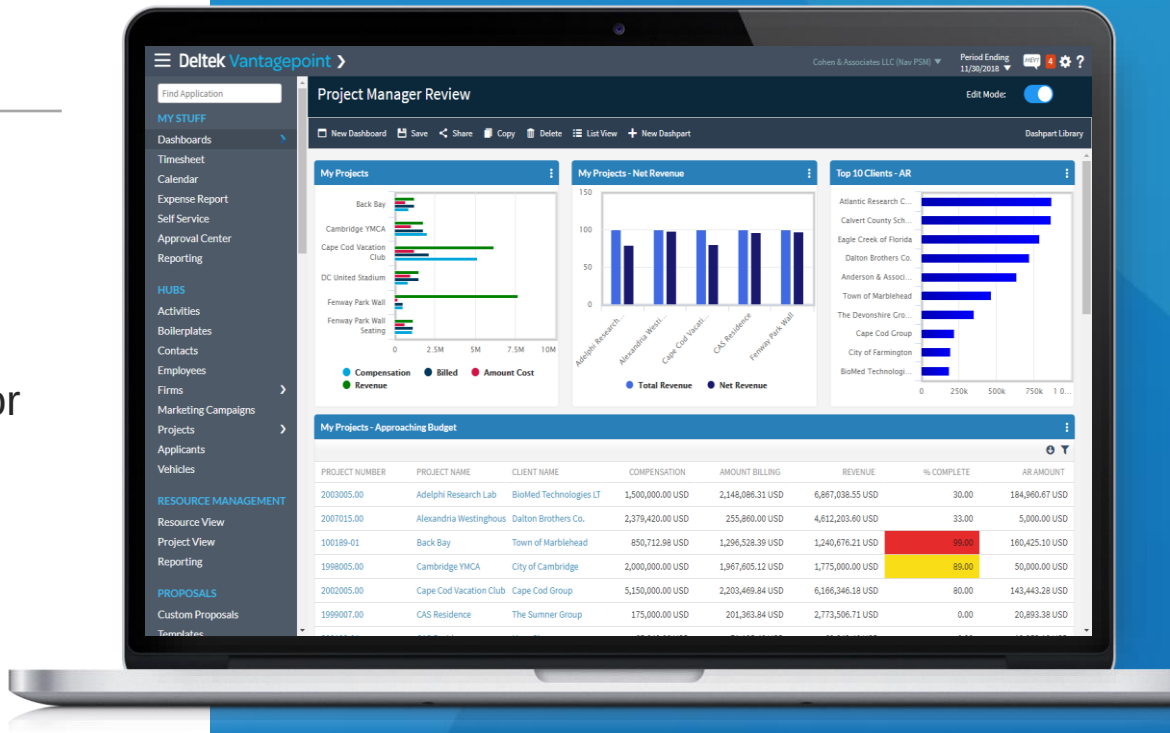
Vantagepoint Commitment

- 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!

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