

Deltek®

Why Vantagepoint?

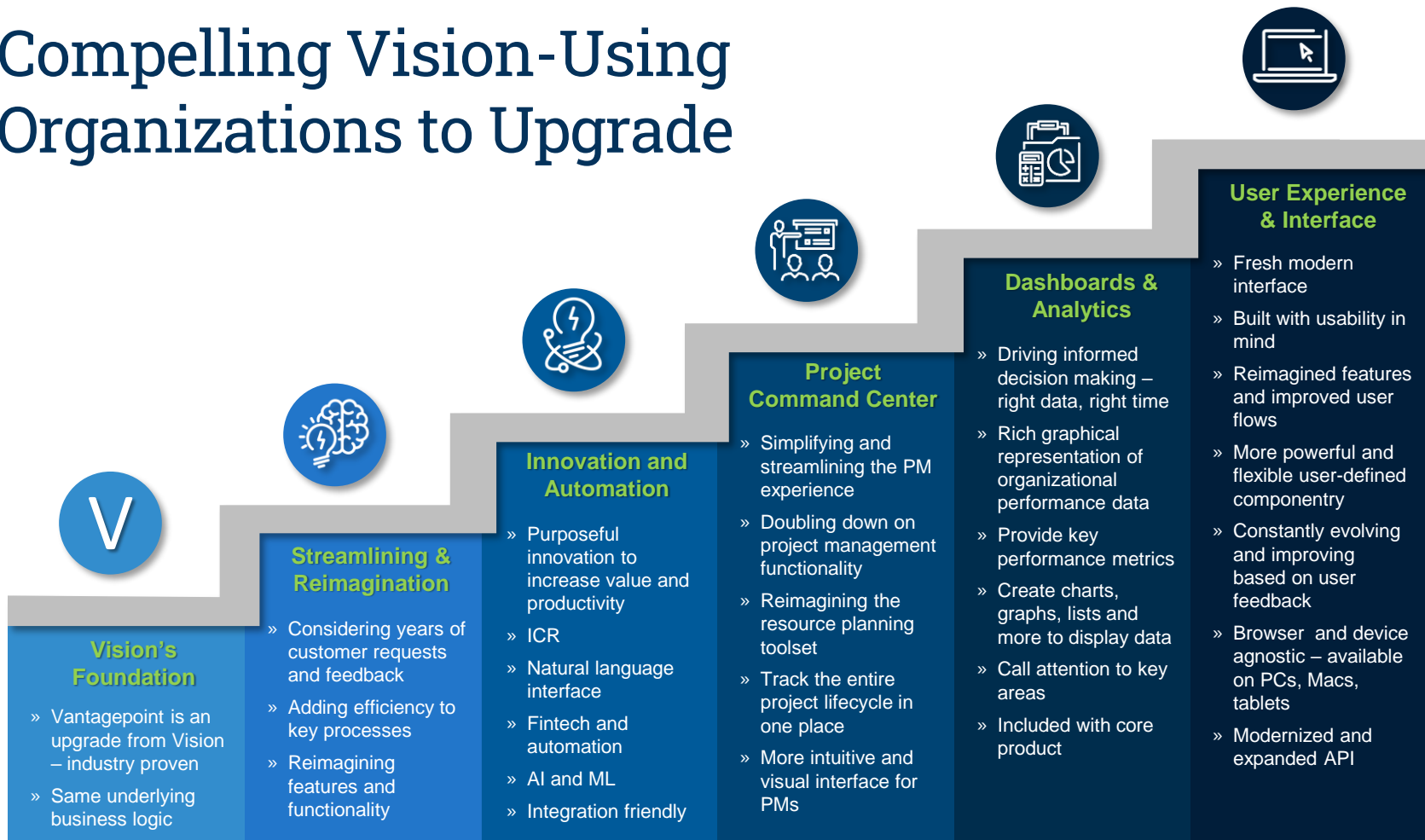
CRM and Proposals

Teresa Bever
Product Director

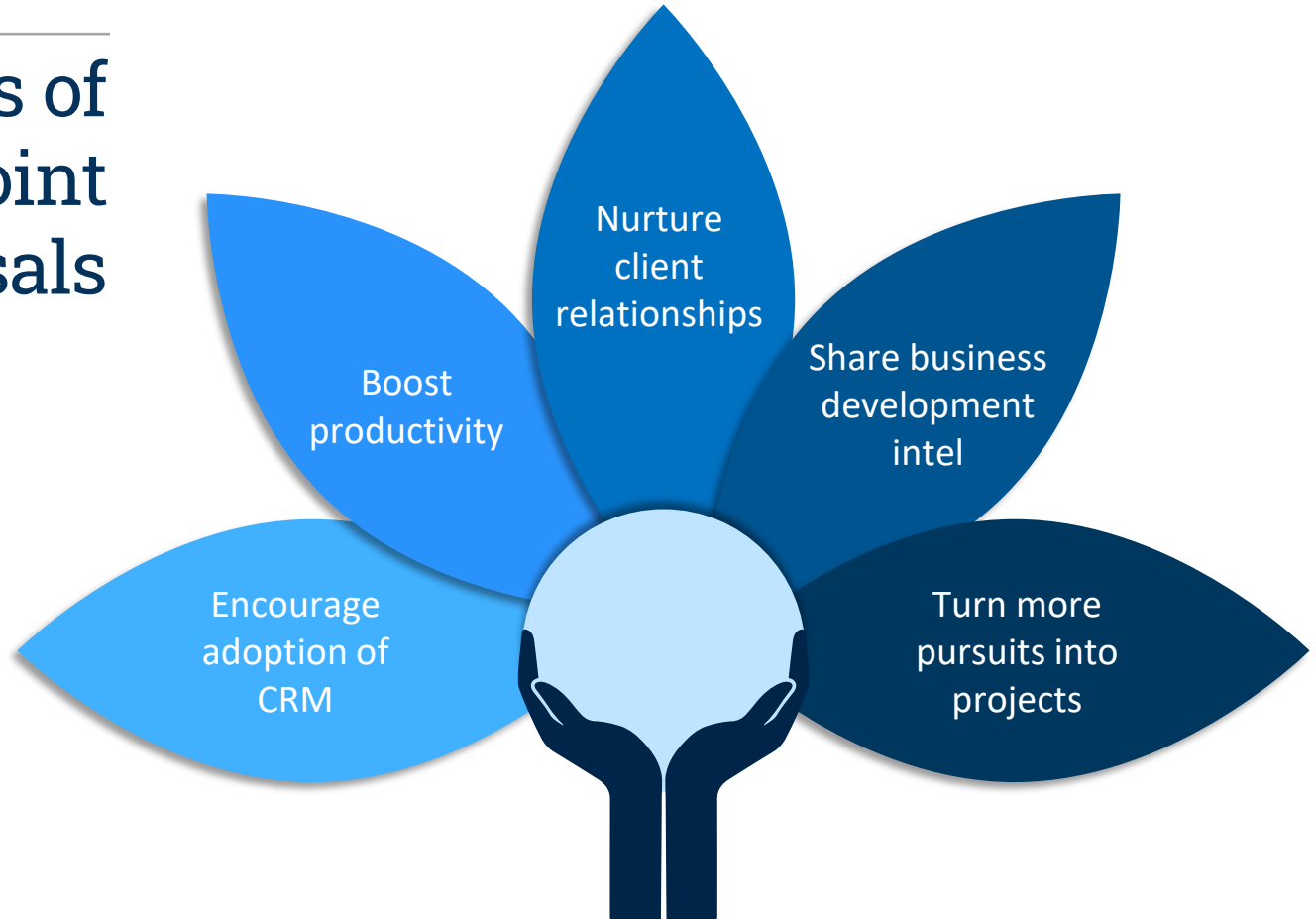


DEAR FUTURE,
I'M READY

Compelling Vision-Using Organizations to Upgrade

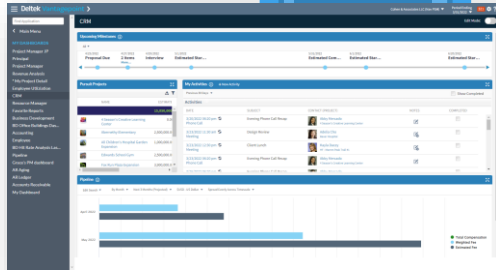


Benefits of Vantagepoint CRM & Proposals



Manage Business Development from Anywhere

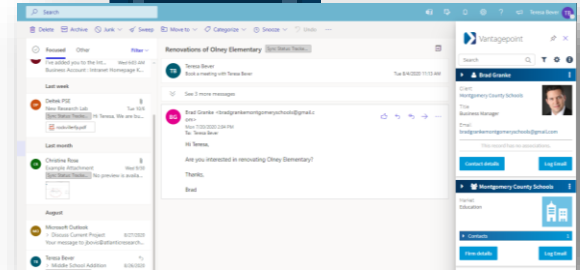
Vantagepoint
Browser



Mobile CRM

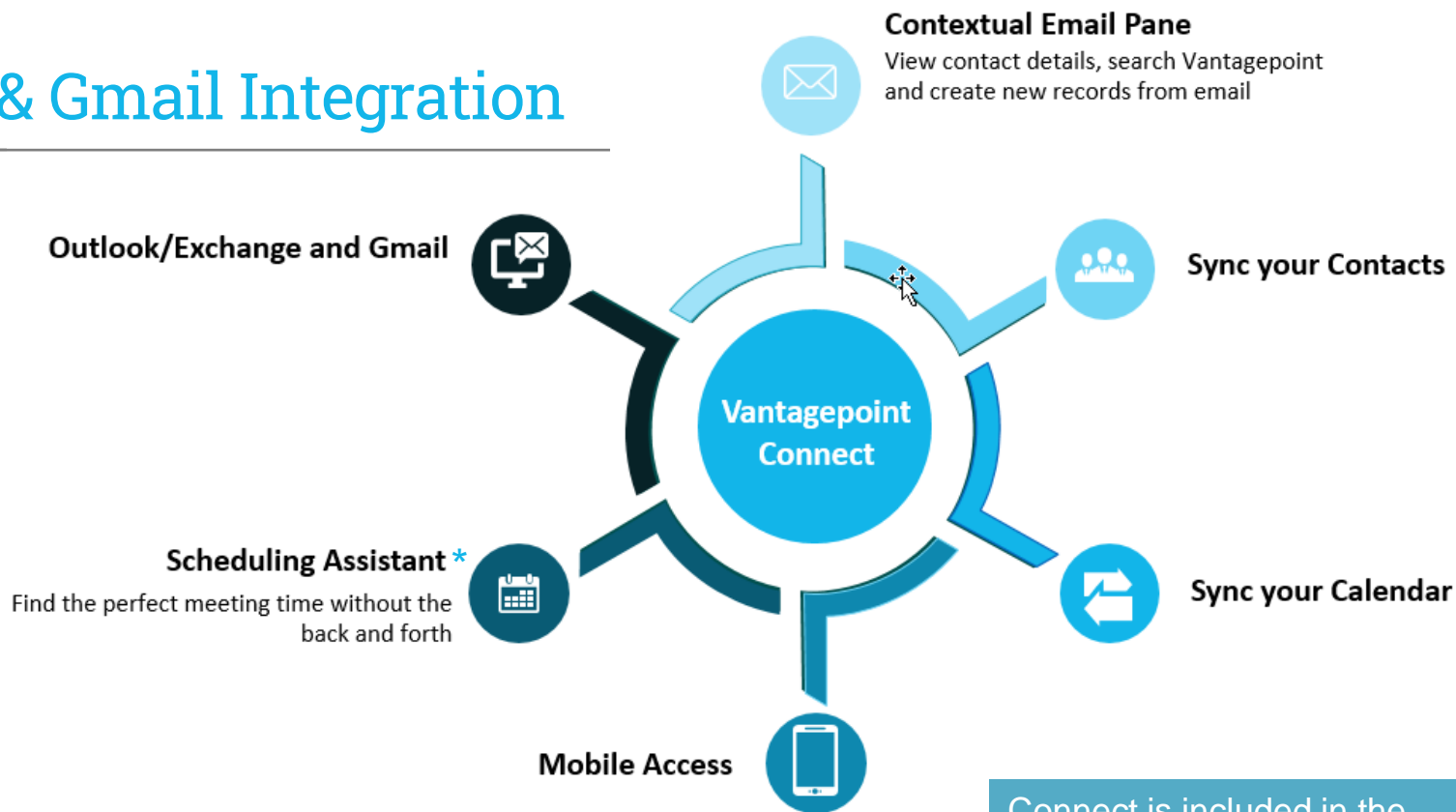


Vantagepoint
Connect



Connect

Outlook & Gmail Integration

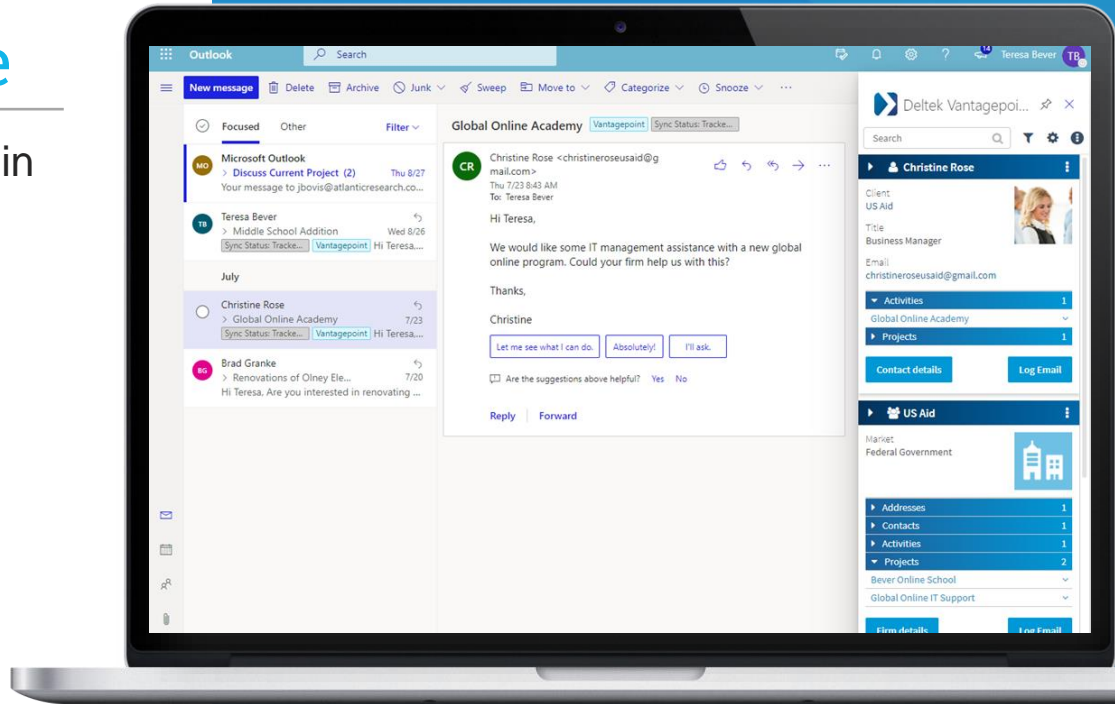


* Scheduling assistant only available in Outlook

Connect is included in the CRM module

Connect Contextual Email Pane

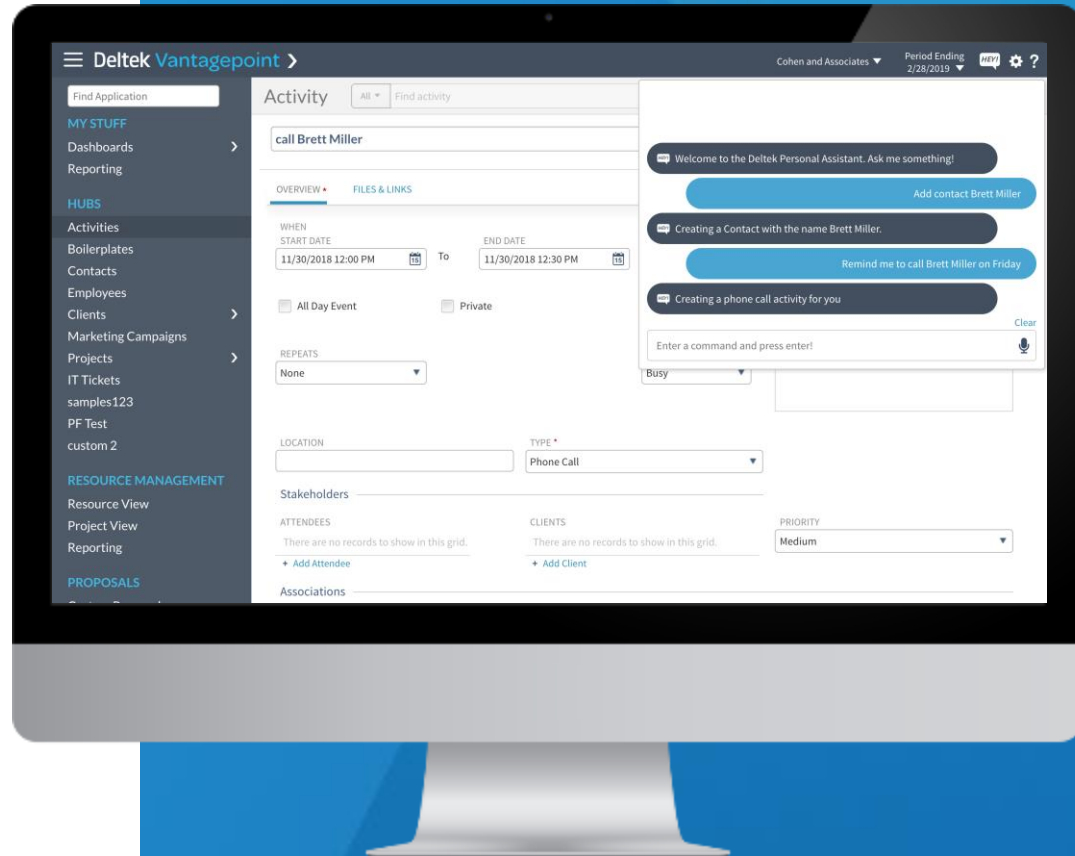
- » Display Vantagepoint information in context of emails
- » Add new contacts or projects
- » Save emails as activities
- » Search Vantagepoint contacts, firms, and projects



Hey Deltek!

Your Personal Assistant

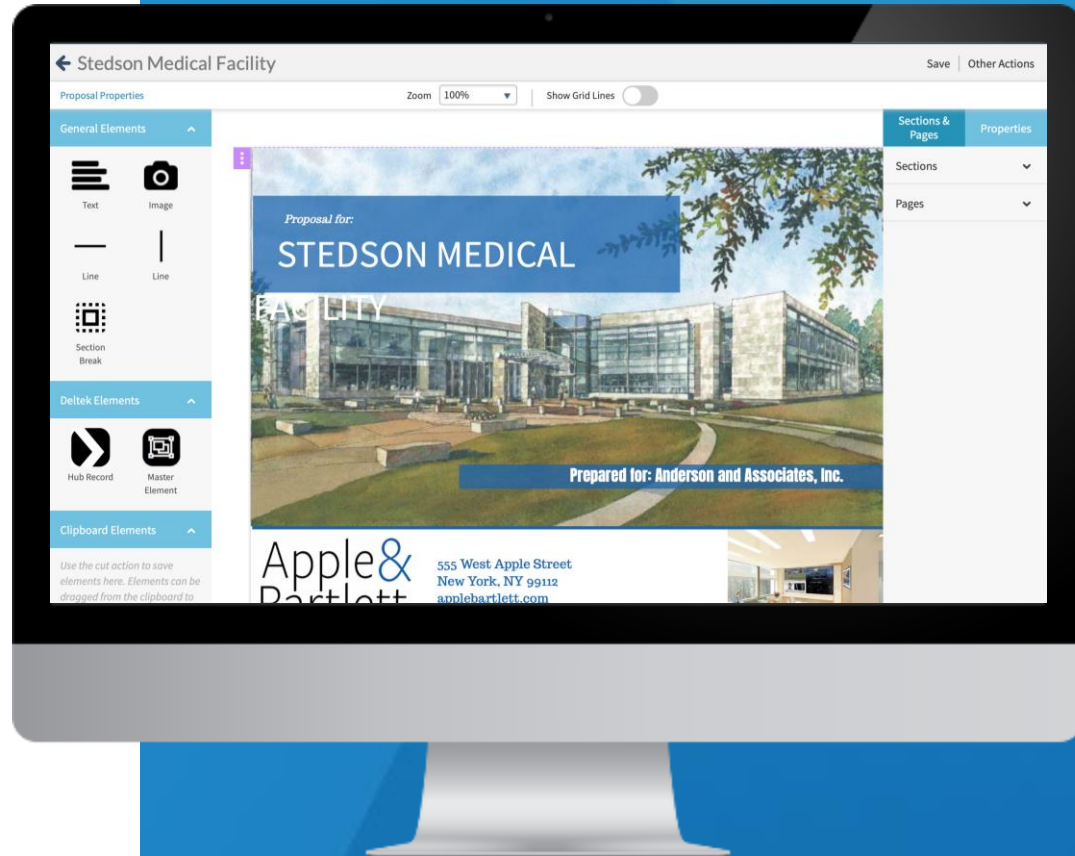
- » Interact with Vantagepoint using natural language
- » Navigate to records
- » Create reminders
- » Add contacts and projects quickly



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

The image shows a tablet displaying the Deltek Activity form. The form is titled 'Renovation of Richard Montgomery High' and includes a 'Mark Complete' checkbox. The form is divided into several sections: 'When' (10/22/2018 1:48 PM to 1:48 PM), 'Location' (None), 'Type' (Email), 'Priority' (Medium), 'Notes' (Hi Aaron, We will be updating and expanding Richard Montgomery High School to accommodate the growth in the area. I will send more information soon. Thanks, Teresa), 'Stakeholders' (empty), 'Attendees' (Teresa Bever (Primary), Aaron Fernburg, + Add Attendee), 'Firms' (Anderson & Associates, LLC (Primary), + Add Firm), 'Associations' (empty), 'Project' (Richard Montgomery High School), and 'Marketing Campaign' (None).

When	Location	Type	Priority
10/22/2018 1:48 PM to 1:48 PM Show Time as Free	None	Email	Medium

Notes
Hi Aaron,
We will be updating and expanding Richard Montgomery High School to accommodate the growth in the area. I will send more information soon.
Thanks,
Teresa

Stakeholders

Attendees
Teresa Bever (Primary)
Aaron Fernburg
+ Add Attendee

Firms
Anderson & Associates, LLC (Primary)
+ Add Firm

Associations

Project
Richard Montgomery High School

Marketing Campaign
None

Activities

Calendar and Dashboard

Deltek Vantagepoint >

Find Application

MY STUFF

- Dashboards
- Timesheet
- Calendar
- Expense Report
- Self Service
- Approval Center
- Reporting

HUBS

- Activities
- Boilerplates
- BoltHubs
- Business Lines
- Contacts
- Employees
- Entities
- Fee Templates
- Firm Types
- Firms
- Glen Test Hub
- Locations
- Marketing Campaigns
- Office Location
- Projects
- Products (Manufacturing)

CALENDAR

Calendar Views

< 2022 >

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

8/1/2022

Views

- ☒ Events
- ☒ Tasks
- ☒ Timesheets

Calendars

- ☒ My Calendar
- ☒ Grace Cohen, AIA
- ☒ Steve

Calendar Settings

Today

Jul 31 - Aug 6, 2022

SUN 31/7 MON 1/8 TUE 2/8 WED 3/8 THU 4/8

all-day

8AM

9AM

10AM

11AM

12PM

1PM

2PM

Ball Game

Design Review

Design Review









Client Visit
Client office

My Activities ⓘ + New Activity

Next 30 Days

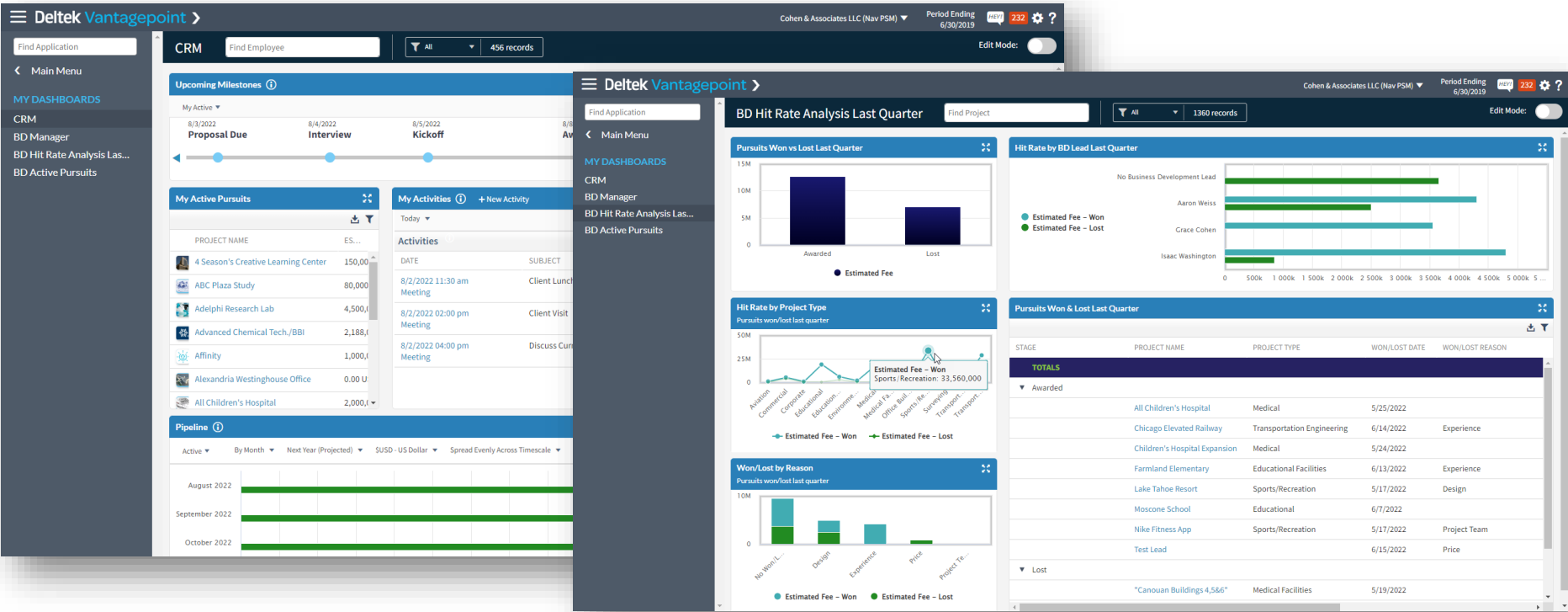
Show Completed

Activities ⓘ

DATE	SUBJECT	CONTACT (PROJECT)	NOTES	COMPLETED
8/1/2022 03:30 pm	Client Visit Meeting	 Tina Tallory Oak Ridge Center - Feasibility Study		<input type="checkbox"/>
8/5/2022 01:30 pm	Management Meeting	 Adelaida Blount Cambridge YMCA		<input type="checkbox"/>
8/19/2022 01:30 pm	Weekly Project Meeting	 Adelaida Blount Cambridge YMCA		<input type="checkbox"/>
8/24/2022 11:00 am	Client Lunch Meeting	 Alfred Fowler 4 Season's Creative Learning Center		<input type="checkbox"/>

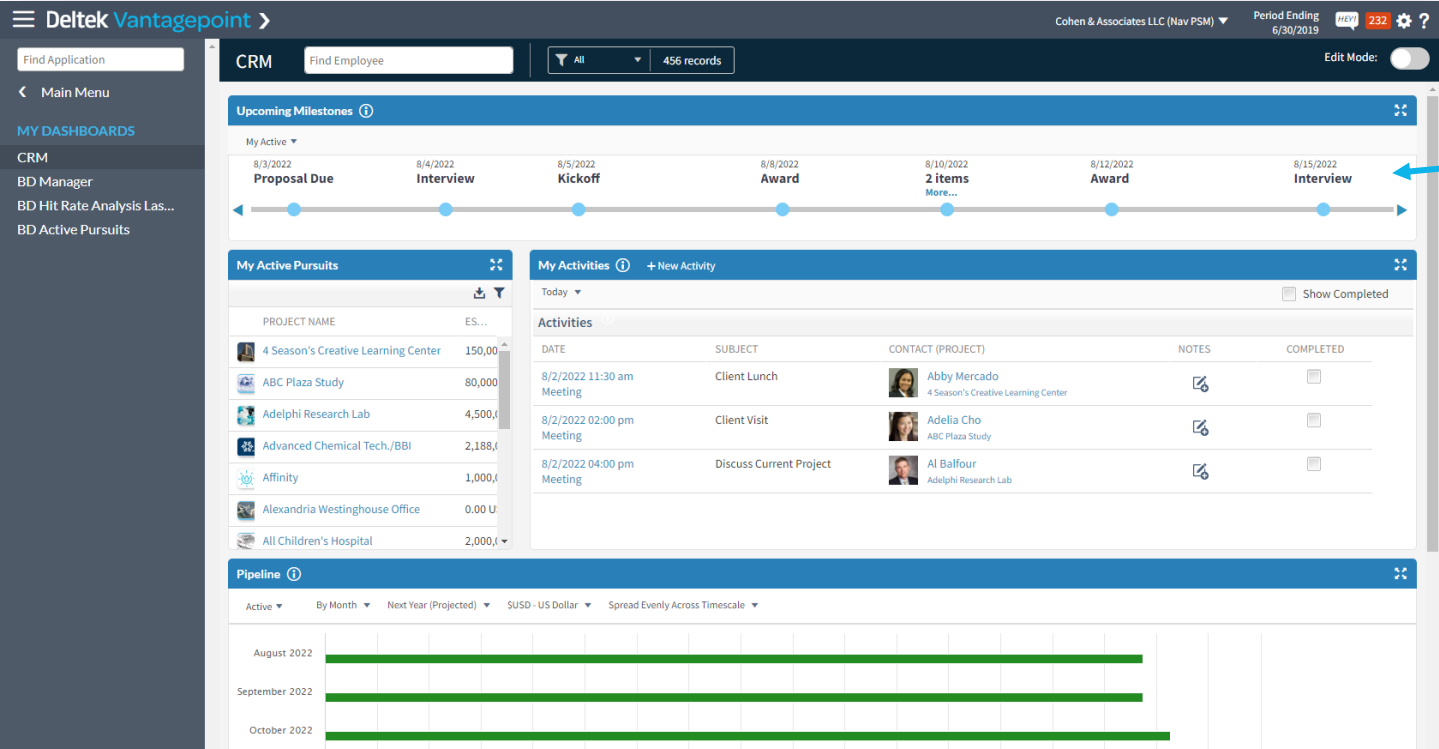
Dashboards

Multiple Dashboards



Dashboards

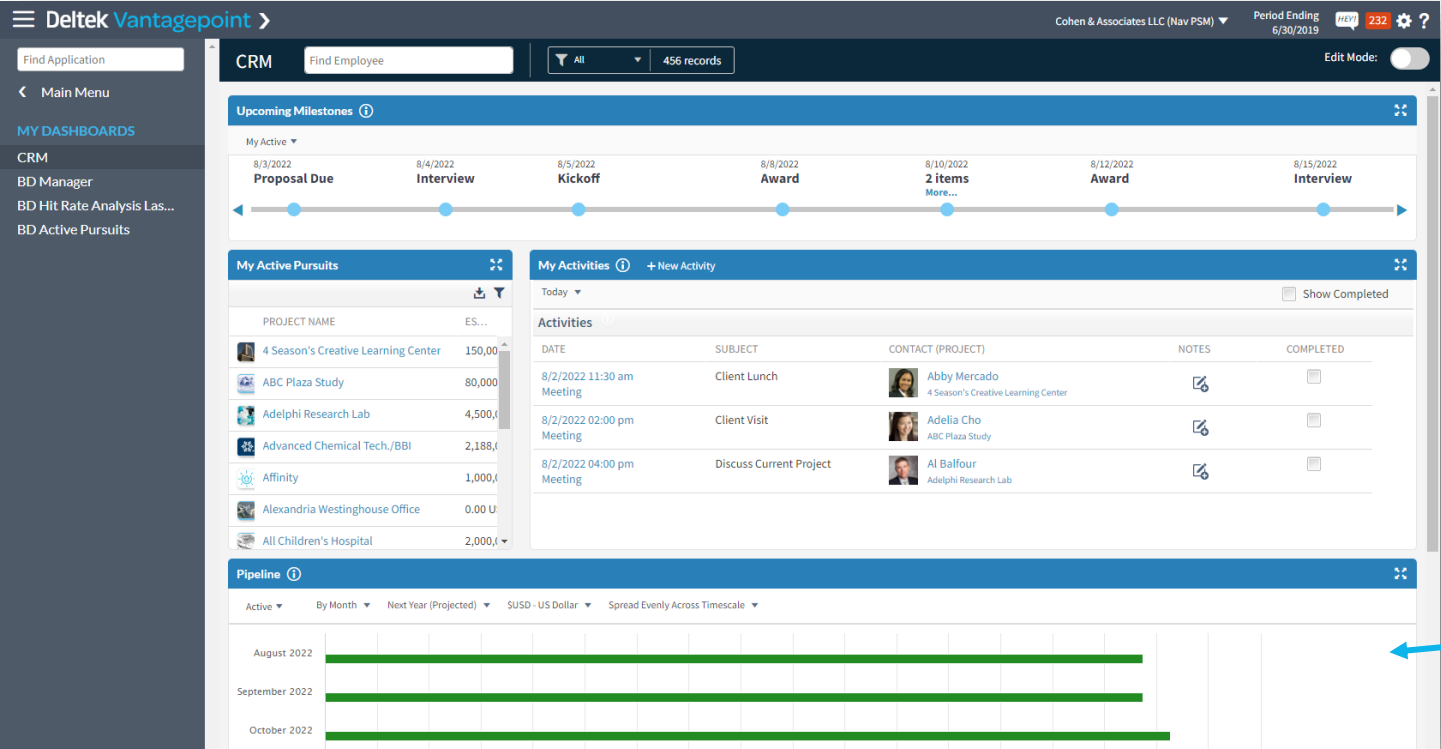
Milestone Chart



View
upcoming
milestones

Dashboards

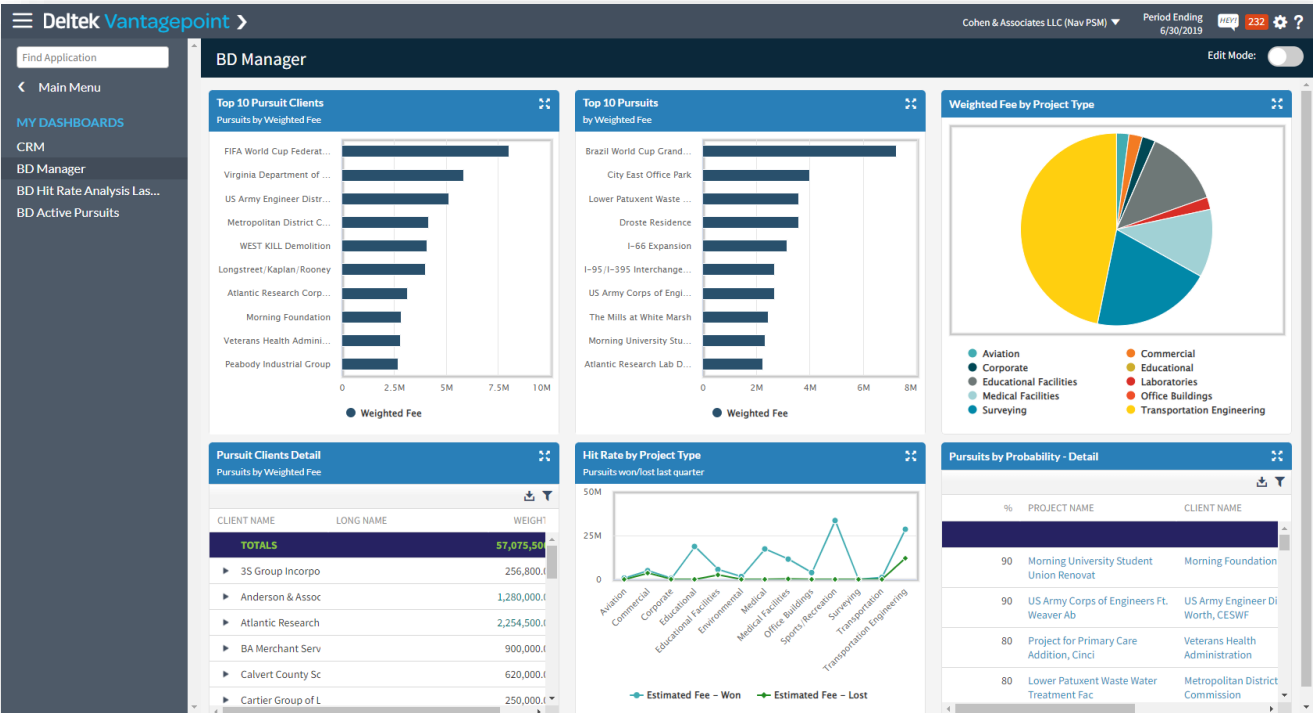
Pipeline



Interactive
pipeline
chart

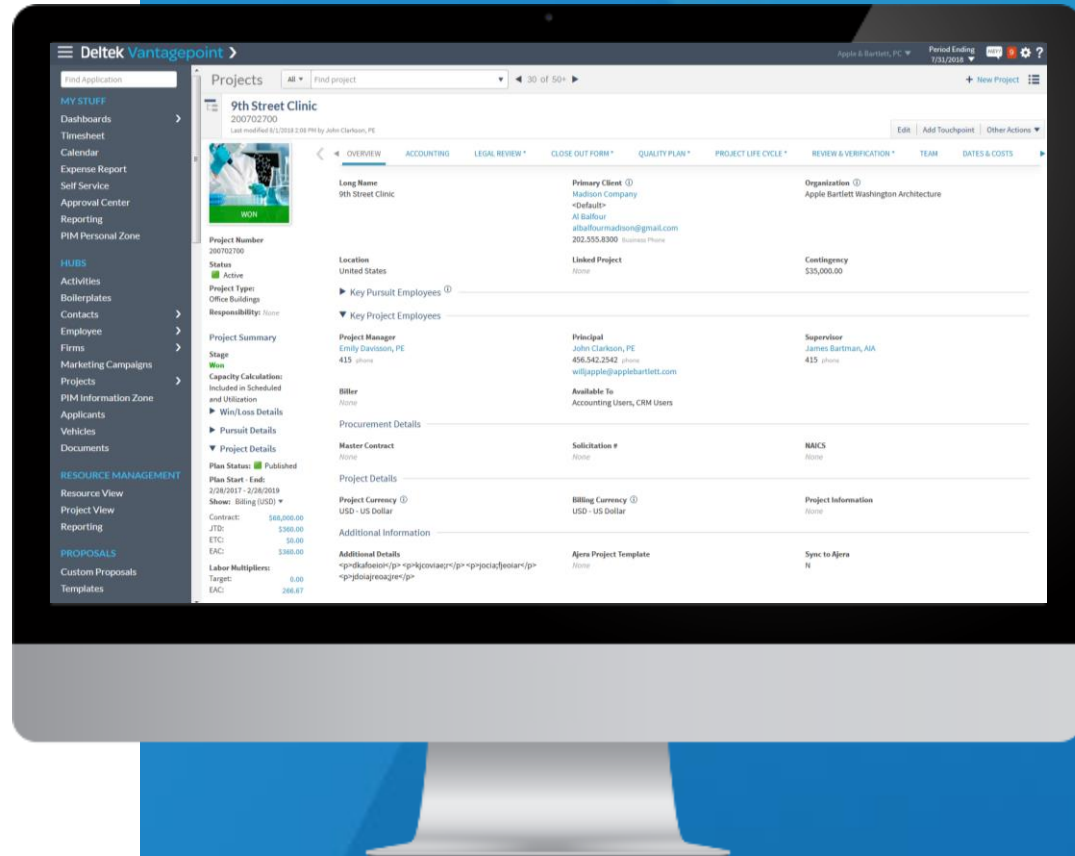
Dashboards

Endless Possibilities



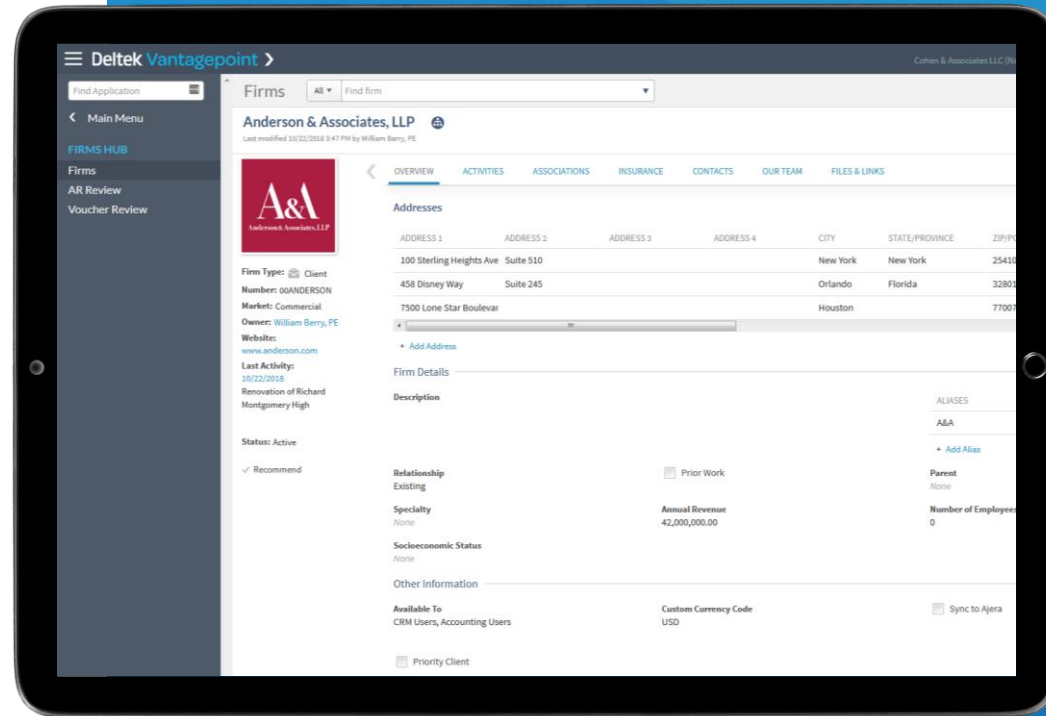
Streamlined Projects

- » 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




Reducing Duplicates

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

Contacts

Enter Contact Name Below Save



Status
Active

Qualified Status
New Lead

Status Date
8/12/2022

Owner

Source

Project Name

Name
First: Tina

Preferred

Title

Professional Suffix

Contact Information
Phone

Firm Address
☐ Firm Mailing Address

Other Address
☒ Mailing Address

Last
Tallory


Suffix


Firm Name

Other Address

Are You Looking For ...

You may be creating a duplicate record. We found potential matches.

 **Thomas Tallory**
Chief Executive Officer

 **Tina Tallory**
Chief Financial Officer

Firms All neway 12 of 12

Neway Steel Structures Ltd
Last modified 7/29/2019 07:47 am by John Clarkson, PE

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

View Contacts for
☒ This firm only ☐ This firm and all lower levels of the hierarchy

Firm Contacts

NAME	STATUS	TITLE	WORK PHONE	MOBILE PHONE	LOCATION	EMAIL
Mike Fenester		Contracts Administrat	321.234.2945	321.981.9301	Orlando Office	bowler@anderson.co
Dylan Zimmerman, /		Chief Executive Officer	713.920.7000	713.549.0537	Texas office	dzimmerman@anders
George DeRosa, AIA		Director of Marketing	212.549.6408	212.392.8593	<Default>	gderosa@andersonas
George Smith, III		Project Manager	321.234.2933	321.549.1594	Orlando Office	gsmith@andersonass
John Katz, AIA		Chief Financial Officer	212.549.6413	212.472.0821	<Default>	jlind@anderson.com
Teresa Bever		Product Director	703.885.9290		<Default>	TeresaBever@deltek.c

+ Add Contact

Contacts from Project Associations

NAME	PROJECT NAME	PROJECT	STATUS	CURRENT FIRM	TITLE	WORK PHONE	MOBILE PH
Adelia Cho	Bever Complex	0006516.51		Neway Steel Structur	Director of Marl	777.555.6666	777.555.6
Adella Lauderdale	Bever Complex	0006516.51		Neway Steel Structur	City Manager		

☐ Recommend

Market
Commercial

Marketing Campaigns

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

The image shows a tablet displaying the Deltak Vantagepoint Marketing Campaigns interface. The screen is divided into a sidebar on the left and a main content area on the right. The sidebar contains navigation options under three main sections: 'MY STUFF' (Dashboards, Timesheet, Calendar, Expense Report, Self Service, Approval Center, Reporting), 'HUBS' (Activities, Boilerplates, Contacts, Employees, Firms, Marketing Campaigns, Projects, Applicants, Vehicles), and 'RESOURCE MANAGEMENT' (Resource View, Project View, Reporting). The main content area is titled 'Marketing Campaigns' and shows details for a specific campaign: 'Medical Facilities Campaign Eastern Seaboard'. The campaign is active, launched on 12/5/2008, and ended on 4/30/2010. It is a direct mail campaign for medical facilities in need of upgrades. The campaign manager is James Bartman, and the marketing manager is Ann Johnson. The campaign has a revenue goal of \$2,000,000, an actual revenue of \$5,311,355, and a potential revenue of \$600,000. The results show 12 responses (0%), 4 awarded projects, 4 total projects, 0 qualified contacts, and 0 firms.

Deltak Vantagepoint

Find Application

Marketing Campaigns

AB Campaign Find marketing campaign

Medical Facilities Campaign Eastern Seaboard

Last modified 4/22/2010 10:21 AM by William Berry, PE

OVERVIEW RESPONSES ACTIVITIES PROJECTS FILES & LINKS

Description
to discover those facilities in need of upgrades

Number
M-0010

Project
Medical Facilities Marketing Campaign

Universe
5,000

Launch - End Date:
12/5/2008 - 4/30/2010

Status: Active

Stage: Active

Type: Direct Mail

Audience:
Project Managers

Objectives:
Lead Generation

Currency:
USD - US Dollar

Exchange Rate Date:
None

Goals
Revenue Goal: \$2,000,000
Actual Revenue: \$5,311,355
Potential Revenue: \$600,000
Budget: \$50,000
Actual Costs: \$0

Results:
12 Responses (0%)
4 Awarded Projects
4 Total Projects
0 Qualified Contacts
0 Firms

Marketing Campaign Manager
James Bartman, AIA
415.452.2585 phone

Marketing Manager
Ann Johnson
415. phone

Marketing
None

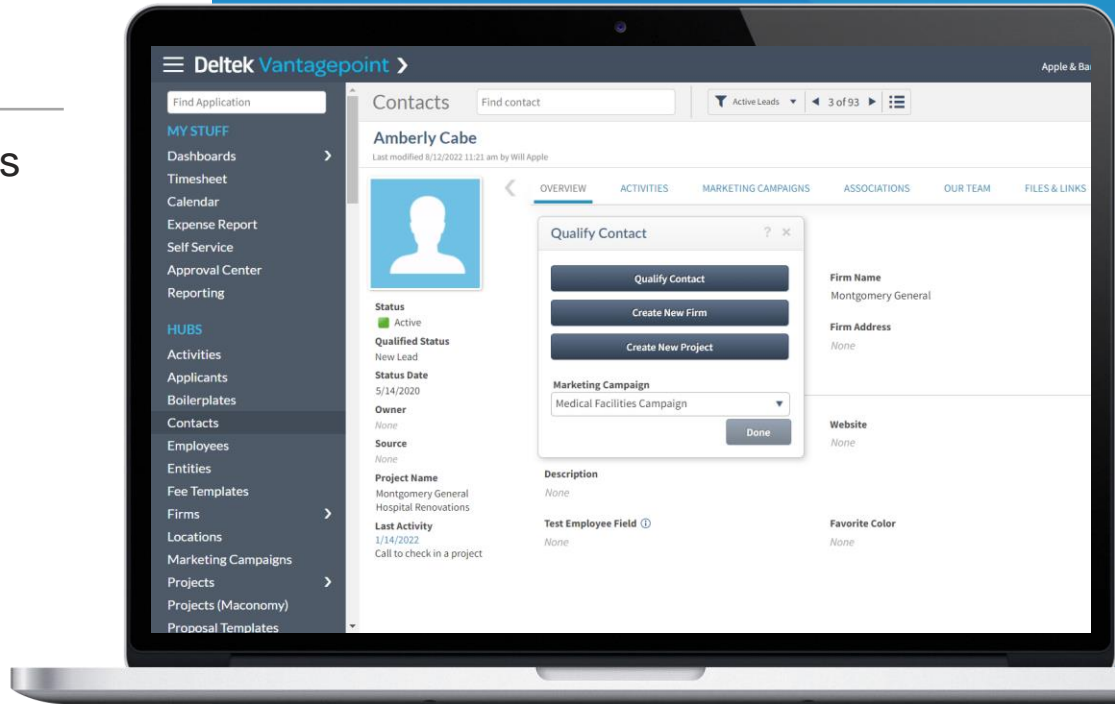
Actions
First: Develop Invitation

Current: Campaign Kickoff

Next: Follow up

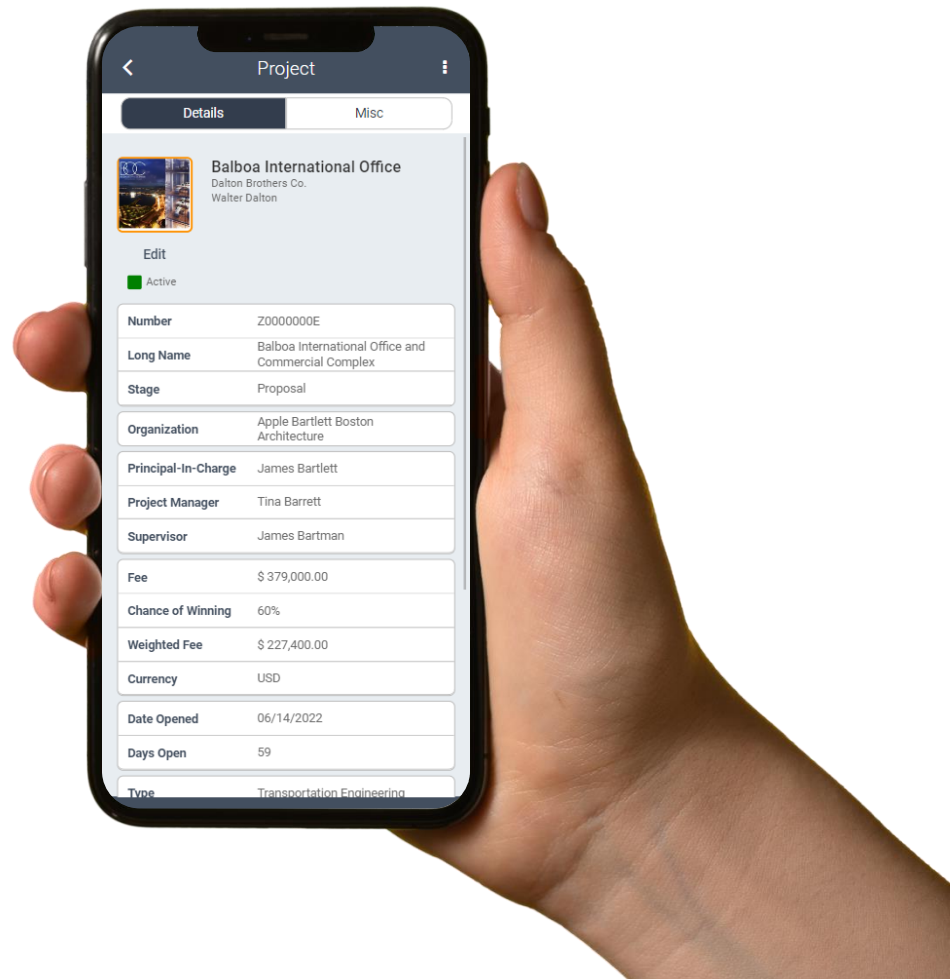
Enhanced Lead Qualification

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



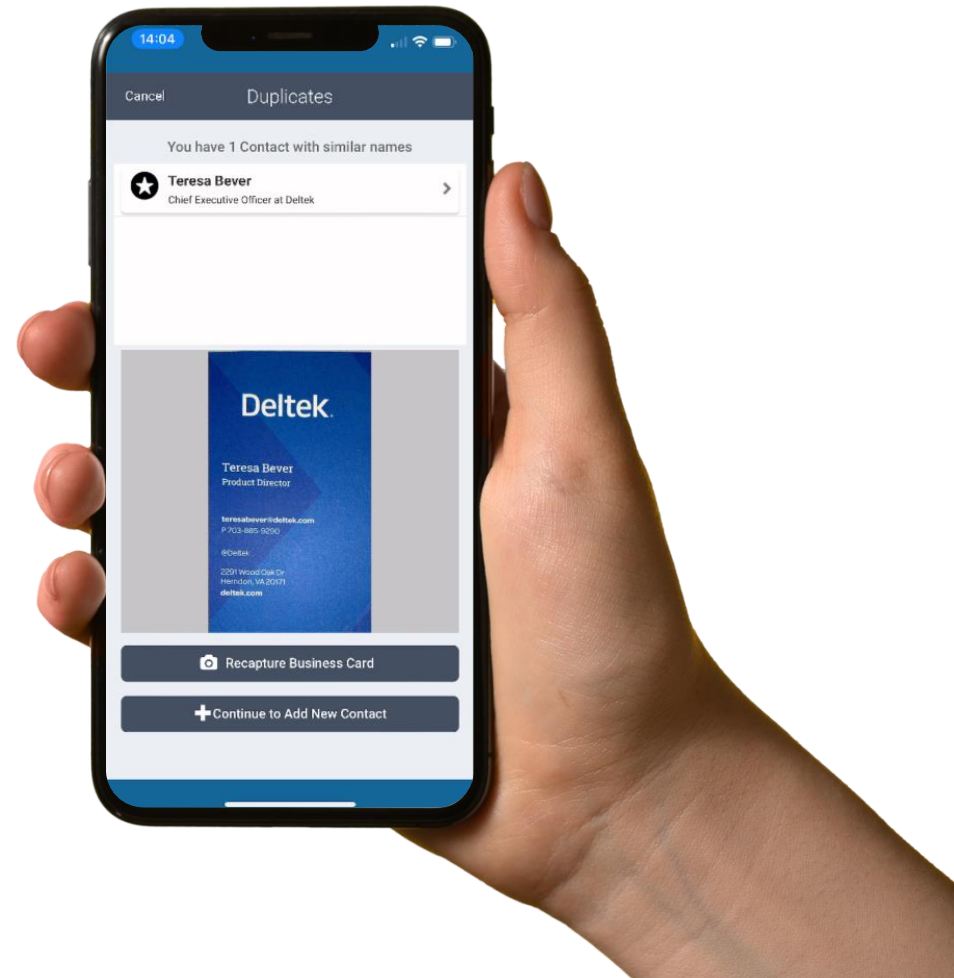
Mobile CRM Enhancements

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



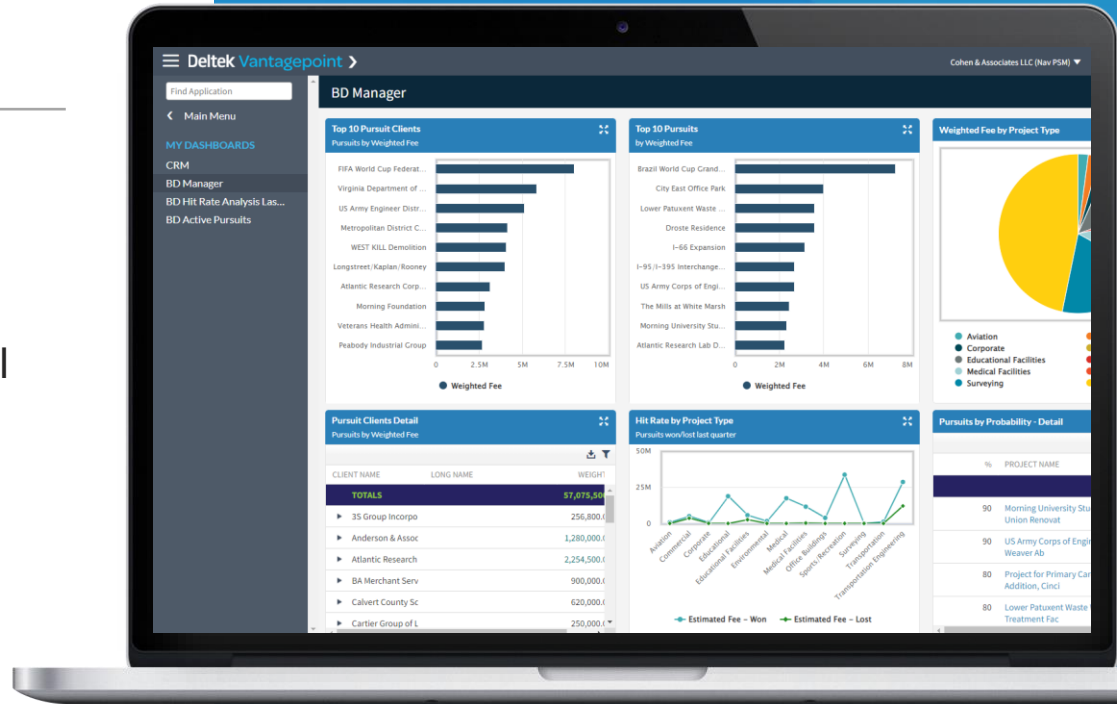
Business Card Scanner

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



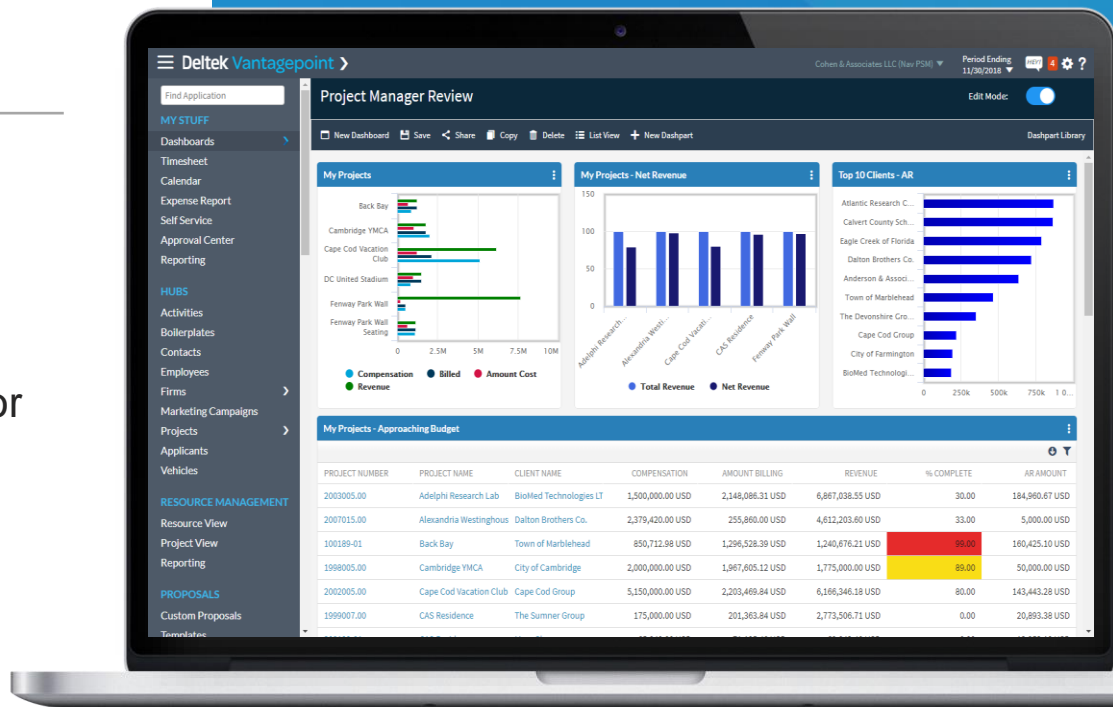
Recap

- » 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

