

## Vision Benefits by Role

### For Marketing/Sales

Your Business Development team used to spend all of its time chasing information instead of chasing new and repeat business. Deltek Vision helps address these marketing/sales challenges.

#### Marketing & Sales Info

##### **Is your marketing/sales information all over the place?**

Vision serves as the single repository for your firm's marketing/sales data, which can then be used in client relationship management, contact management, opportunity management, and proposal development. By being the single point of entry and access for this data, Vision saves time, reduces frustration, and increases data reliability. With Vision, marketing/sales data will become a corporate asset.

##### **Vision stores all of your marketing/sales information in a single place:**

- Web-based architecture
- Complete marketing/sales database
- Dashboards
- Targeted, configurable marketing/sales reports with drill down
- Search capabilities

#### Win projects & Engage-

##### **Are you winning enough new work?**

Vision provides a framework for building a consistently executed, winning marketing/sales program that is proactive rather than reactive. It will help you win more of the right kind of work by providing insight into past project performance for different clients and project types. It provides crucial project and marketing/sales metrics that let you measure your success and adjust course quickly.

Vision helps automate the entire proposal process so you can create professional-quality, winning proposals faster. It even completes government forms, such as the SF 330.

It stores and lets you instantly search on essential employee and project information that help demonstrate your depth of experience and successful track record.

Vision stores and gives instant access to boilerplate, including resumes and project profiles. And it makes it easy to prepare winning proposals by integrating Vision information directly with Microsoft Word and desktop publishing systems.

**Vision helps you win the right kind of work more often:**

- Complete marketing/sales database
- Complete CRM capabilities including contact, opportunity and activity management
- Complete proposal automation capabilities
- Resource Planning module for preparing cost estimates
- Past project data for supporting cost estimates and evaluating the project portfolio
- SF 330
- Integration with Microsoft Word and desktop publishing systems

## Manage Client Relationships

**Are you losing clients because you don't have a unified and consistent approach to managing your client relationships?**

Vision provides a framework for building a client relationship program that will increase client satisfaction, client retention and client referrals, and reduce the cost of doing business.

Vision client relationship management is designed specifically for project-based businesses. Its single, centralized database makes it possible for everyone in your organization—from sales and marketing/sales to accounting and finance to management and administration—to work together to meet your clients' needs.

**Vision helps you manage your relationships with existing clients for more repeat business and profitable projects/engagements:**

- Activity management
- Alerts
- Custom fields and tabs
- Client nurturing through the marketing/sales Campaign Info Center