

# Deltek Vision® CRM

## Aligning Business Development with Project and Financial Management

*“Vision has brought our marketing, accounting and project management departments together. For the first time, these departments are regularly meeting to track and follow up leads, assign values to each lead and track hit rates on these leads through multiple stages. Not only is this helping us understand what’s coming down the pipeline so we can streamline our resources accordingly, but it is also helping our firm get a clear understanding of how our marketing efforts are being received.”*

» Durrant  
Performance Innovation

### Make Choices, Not Sacrifices

Deltek Vision Customer Relationship Management (CRM) is designed specifically for project- focused businesses. Making it possible for everyone in your organization to work together to meet your clients’ needs, Deltek Vision CRM gives your firm an advantage over your competition by putting your clients at the center of your business. Finally, through automating client management, you get everything you need to gain the competitive edge, win more business and increase customer satisfaction.

### Deltek Vision CRM Includes:

- **Client and Contract Management** – track key information throughout the firm
- **Opportunity Management** – track leads and manage your pipeline
- **Marketing Automation** – develop and track targeted campaigns from one system
- **Schedule and Activity Management** – automatically track and synchronize your instructions with clients

### Why Choose Deltek Vision CRM?

Most solutions that allow for sales force automation and customer relationship management are designed for organizations selling individual products, not for firms that deliver services on a project basis. The difference, however, is that each opportunity for project-based firms is unique – and generic ERP just can’t adapt to that kind of variability. For growing firms, generic CRM translates into ineffectual CRM.

### Benefits:

- Specifically designed to meet the needs of projec-based firms
- Only solution that fully aligns busines development with project and financial management
- Goes way beyond “generic” (also known as ineffectual) CRM

**Key Features and Benefits**

*Controlling and Coordinating all Facets of Client Management*

With Deltek Vision CRM marketing functionality, you can create effective marketing campaigns targeted to key prospects, clients and opportunities

**Client and Contact Management** – Deltek Vision CRM organizes all of your client information—including day-to-day interactions—in one centralized database. This instant access to client and contact information lets you leverage and nurture professional relationships to win more business. Marketing staff, sales personnel, project managers, executives and administrative personnel can share all types of client information, including:

- Future and past activities that relate to clients and contacts, including meetings, phone calls, tasks and emails
- Future opportunities and past projects relating to your clients
- Relationships that your employees have with clients and contacts
- Relationships among your clients and contacts
- External files, such as contracts and correspondence, that relate to your clients and contacts

**Opportunity Management** – Deltek Vision CRM opportunity and pipeline tracking capabilities allow sales and business development professionals to manage all aspects of the opportunity process, including:

- Lead/opportunity tracking
- Fee and backlog forecasting
- Proposal tracking
- Opportunity team management
- Scope and fee proposal development
- Opportunity-related files

Deltek’s flexible reporting capabilities include a catalog of opportunity reports that marketers and managers can use for lead tracking and meaningful analysis of anticipated fees, trends, success rates and more.

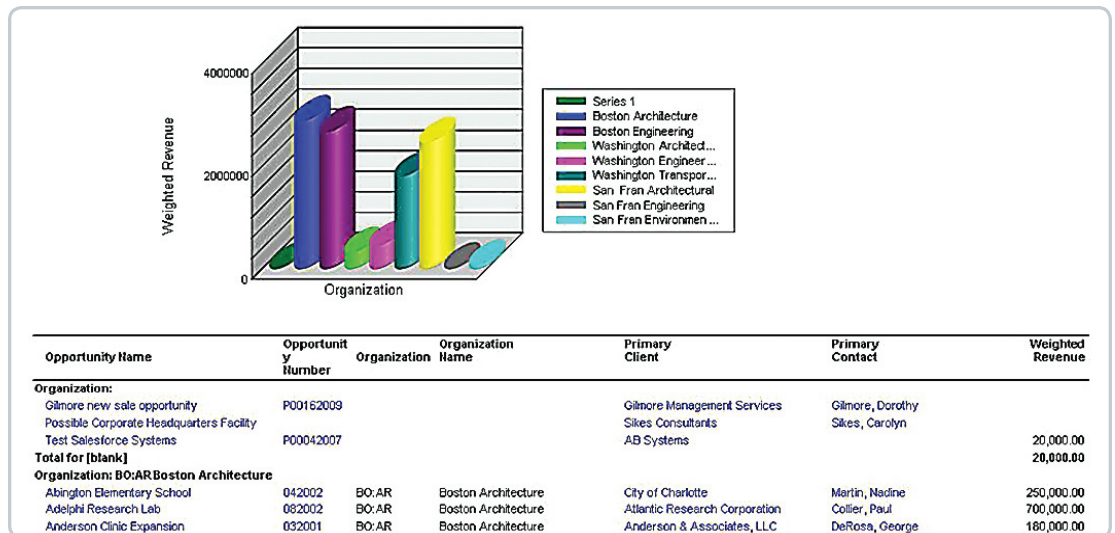


Figure 1: Vision gives you unprecedented insight into your opportunity pipeline

Deltek Vision CRM supports hundreds of concurrent users, yet can be readily scaled down to meet the requirements and resources of a small organization

**Marketing Automation** – With Deltek Vision CRM marketing functionality, you can create effective marketing campaigns targeted to key prospects, clients and opportunities. From mailing campaigns to email blasts, Deltek Vision CRM provides the tools you need to tailor your message and your mailing list, through user-defined lists and queries that can be saved for future campaigns. Deltek’s sophisticated mail-merge functionality allows you to create correspondence customized for each recipient. Deltek Vision CRM also logs all activity for each campaign, providing a historical record of all materials, emails and correspondence sent to a specific contact.

Marketing Campaign Summary Monday, February 23, 2009 1:00:09 PM

Apple & Bulfinch, PC

<b>Name</b>	Best Practices for School Design		
<b>Number</b>	C-0010		
<b>Description</b>	Seminar to attract districts planning new schools		
<b>Organization</b>	San Fran Architectural	<b>First Action</b>	Develop Invitation
<b>Project</b>	School Seminar	<b>Current Action</b>	Follow-up Calls
		<b>Next Action</b>	Follow-up Calls
<b>Target Audience</b>	C-level Executives	<b>Status</b>	Active
<b>Objective</b>	Lead Generation	<b>Launch Date</b>	12/1/2004
<b>Type</b>	Seminar	<b>End Date</b>	4/30/2005
<b>Budget</b>	35,000.00	<b>Universe</b>	903
<b>Actual Cost</b>	42,500.00	<b>Actual Response</b>	15
<b>Revenue Target</b>	2,000,000.00	<b>Response Percent</b>	3
<b>Campaign Manager</b>	Handerson, Calaine	<b>Converted Clients</b>	2
<b>Marketing Manager</b>	Barnett, Tina	<b>Converted Contacts</b>	2
<b>Manager 2</b>	Sullivan, Doree	<b>Opportunities</b>	2
<b>Record Status</b>	Active	<b>Awarded Projects</b>	1

Name	Company	Leads	Status	Description

Figure 2: With Vision, you have the tools to develop and monitor effective marketing campaign to earn new clients and help retain existing clients

**Schedule and Activity Management** –

Deltek Vision CRM offers powerful and intuitive activity management and calendar functionality. Professionals from across your organization can schedule activities and view calendar events in daily, weekly and monthly formats. Individuals can schedule activities through Deltek’s calendar views or through Microsoft Outlook. Connect for Microsoft Outlook, a solution that integrates Deltek Vision with Outlook, enables individuals to be able to perform important Vision tasks directly in Outlook. Manage appointments, emails, and contacts as well as manage your clients, activities and opportunities, all from Outlook.

**Benefits not found in traditional CRM solutions**

In generic or traditional customer relationship management solutions, you won’t find the same benefits of Vision CRM.

**Customer Relationship Management** –

Tracks contacts, opportunities, estimates, proposals and all the associated communications. What’s more, Vision CRM is today’s only solution that is fully integrated with project management, including CMO and federal opportunities.

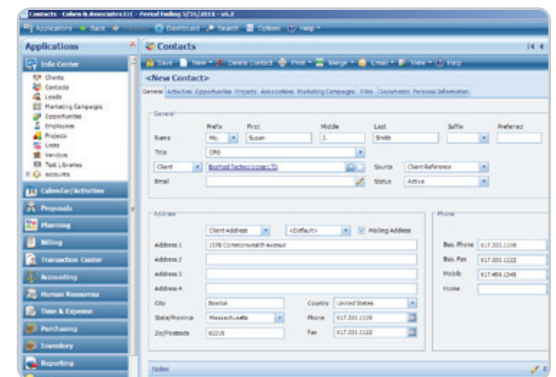


Figure 3: Deltek Vision CRM contact information center.

**Proposals** – Because project cost information is already available in Vision, business developers can accurately and quickly identify information and create proposals with just the mere click of a mouse; no more manual labor.

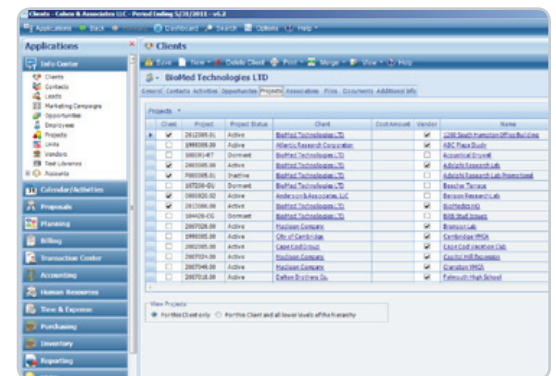


Figure 4: Deltek Vision CRM project information center team tab.

**World Headquarters:**

**United States**

2291 Wood Oak Drive  
Herndon, VA 20171-2823  
800.456.2009

**Worldwide Locations:**

**Belgium**

+32 (0) 2 709 2191

**Denmark**

+45 35 27 79 00

**Germany**

Frankfurt am Main  
+49 6967733106

**The Netherlands**

+31 (0)20 347 3080

**Norway**

+47 22 01 38 00

**Sweden**

+46 (0)8 587 077 00

**United Kingdom**

London  
+44 (0)20 7518 5010

[deltek.com](http://deltek.com)  
[info@deltek.com](mailto:info@deltek.com)

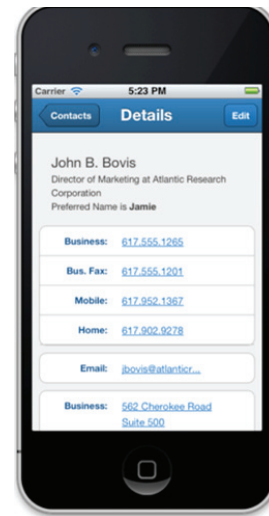
**Adobe InDesign** – Creating an elegant, winning proposal has never been easier or faster. With InDesign you can simply create an InDesign template using your company’s fonts, colors and styles. You can also add placeholders for Vision information, including pictures. When the time comes to create a proposal, simply select which Vision records to include and merge the data directly into InDesign. Vision’s InDesign integration combines the layout power of InDesign with the information that already exists in Vision—allowing you to quickly create sleek proposals.

**Government Forms** – Just like with proposals, all the work and stress of filling out complicated, specific government forms is instantly eliminated. Instead, Vision CRM users can automatically create and submit their government forms with a single click of a mouse.

**Connect for Microsoft Outlook** – Saving time and allowing you to use the marketing tools you already know, Vision Essentials CRM fully synchronizes to Microsoft Outlook. What you get is a single, robust tool that helps your firm more successfully pursue and bid on projects.

**Federal Market Intelligence** – Again, Vision CRM provides a single, central repository for opportunity, federal agency, company, pricing and task order research. This eliminates all of the time-consuming processes associated with identifying sales opportunities and staying up-to-date with procurement changes

**Mobile - Anytime, Anywhere Access** – It is now easier than ever to access CRM data from Deltek Vision CRM. Anywhere, anytime access via a mobile device allows business developers to look up key contact information with the touch of a finger. With more and more organizations working from their mobile devices in the field, having critical information at your fingertips is key to keeping you connected to prospects and clients.



*Figure 5: Touch CRM for Vision empowers anytime, anywhere access.*

*It all adds up to a solution that helps you win more business. By providing a complete, centralized and cost-effective project-based solution for managing your business development and marketing information and activities, Deltek Vision CRM helps you make more effective business development decisions while increasing client satisfaction and revenue.*

Deltek is the leading global provider of enterprise software and information solutions for professional services firms and government contractors. For decades, we have delivered actionable insight that empowers our customers to unlock their business potential. 16,000 organizations and 2 million users in over 80 countries around the world rely on Deltek to research and identify opportunities, win new business, optimize resources, streamline operations, and deliver more profitable projects.  
**Deltek – Know more. Do more.® deltek.com**