

# Deltek First Vision Essentials Resource Planning

## Align Project and Resource Management

*“Before we implemented the Resource Planning module, every project manager had their own way of doing things that worked for them, including Excel spreadsheets. Given the lack of standardization across the firm – I had no way of reporting at the office, region or firm-wide level. When I saw [Deltek Vision] resource planning demonstrated, I immediately realized: that’s the tool we need to replace our current process.”*

» Barbara Bunting,  
Associate Vice  
President, Lochner

### Choices, not sacrifice

Regardless of your firm’s size, you want a connected organization with visibility across and control throughout. Before now, small-to-mid-sized Professional Services firms had two options: stitch together narrow, stand-alone and incommunicative solutions for sales, project management and financial management, or make an up-front investment for a generic ERP solution. Either way, these solutions forced growing businesses to make unwanted business sacrifices.

### But what if...

What if a single solution could magically erase all the problems and conflicts associated with gaining world-class ERP? What if your solution:

- Brought together resource and project planning, project management and financial management?
- Made sure that the right people were assigned to the right projects?
- Didn’t require a sophisticated IT infrastructure and dedicated personnel?
- Had the high-focused capabilities of a solution deployed by large enterprises, all at an attractive price?

### The Perfect Fit

Deltek First Vision Essentials™ Planning puts the proven capabilities of Deltek Vision and Deltek Resource Planning—the most widely used professional service management solution—within easy reach for today’s growing firm. Specifically designed to meet the needs of Professional Services firms, Deltek Vision Essentials Planning is the first and only solution that fully automates scheduling, budgeting, forecasting and resource management in an easy-to-own, cloud-based software-as-a-service (SaaS).

### Why Centralized Resource Planning?

Nothing is more important to a Professional Services firm than its resources. Yet, bridging the gap between project planning and resource planning is a daily challenge, even for successful firms. That’s because traditional, stand-alone project and resource management systems don’t communicate, leaving firms vulnerable to error-prone processes and forcing them to waste time retrieving resource information from multiple, segregated sources. For growing Professional Services firms, siloed solutions often mean projects that are over time and budget.

Develop deep insight into all areas of operations so that data is accurate, current and available on demand, truly turning information into knowledge.

### Complete Visibility

Because the Deltek First Vision Essentials Planning solutions are based on the Deltek First Vision Essentials platform, project planning and resource management are fully and seamlessly integrated with the financial management aspects of the solution.

Unlike narrow views of isolated information, within disconnected systems, Deltek's Vision Essentials Planning's complete visibility grants you with:

- Stronger resource utilization that results in more profitable, on-time projects
- A comprehensive view of the entire organization
- Up-to-date, real-time data regarding clients, resources, work and financial results
- Easy accessibility to anyone in the organization, anywhere, anytime

### Total Control

Having all information about projects, financials and resources in one place allows firms to make guided decisions when faced with changes driven by project scope changes, resource changes and even business expansion. This is important for professional service organizations that want to grow and have control over their business.

With Vision Essentials Planning, firms can:

- Easily spot under or over-utilization of resources, eliminating "staff burnout" and "idle workers"
- Ensure the right/best person is assigned to the right project (based on skill set, not just availability)
- Increase average billing percentage per employee
- Better guide workflow and control finances, lowering risks and allowing for much more predictable and consistent margins

Resource Utilization										
Save Show Panel Navigator Plan Status Help										
Resource Name	Billable Goal Hours	Total Available Hours	Apr 2012 4/18 - 4/22 Wed-Sun	Apr 2012 4/23 - 4/29 Mon-Sun	Apr-May '12 4/30 - 5/6 Mon-Sun	May 2012 5/7 - 5/13 Mon-Sun	May 2012 5/14 - 5/20 Mon-Sun	May 2012 5/21 - 5/27 Mon-Sun		
Alvarez, Craig	276	333	26 (135%)	43 (135%)	46 (145%)	47 (148%)	47 (148%)	39 (151%)		
Anderson, Stacey	333	416	25 (106%)	43 (108%)	44 (111%)	45 (112%)	44 (110%)	35 (111%)		
Anderson, Steve	291	416	28 (115%)	46 (115%)	44 (111%)	44 (110%)	44 (110%)	35 (110%)		
Apple, William	354	416	62 (257%)	72 (181%)	57 (142%)	52 (129%)	52 (129%)	41 (129%)		
Arnold, Dennis	366	416	0 (0%)	0 (0%)	16 (40%)	20 (50%)	20 (50%)	16 (50%)		
Baldwin, Brenda	366	416	2 (8%)	6 (15%)	0 (0%)	0 (0%)	1 (3%)	3 (9%)		
Baldwin, Diane	366	416	24 (101%)	41 (101%)	39 (97%)	39 (97%)	39 (97%)	31 (97%)		
Ball, Amy	354	416	24 (101%)	41 (101%)	39 (97%)	39 (97%)	39 (97%)	31 (97%)		
Banks, Martin	312	416	36 (150%)	60 (150%)	54 (135%)	60 (149%)	60 (149%)	48 (149%)		
Barrett, Tina	291	416	24 (101%)	41 (101%)	39 (97%)	39 (97%)	39 (97%)	31 (97%)		
Bartlett, James	166	416	31 (127%)	50 (124%)	25 (63%)	40 (100%)	42 (105%)	32 (102%)		
Bartman, James	166	416	24 (101%)	41 (101%)	39 (97%)	39 (97%)	39 (97%)	31 (97%)		
Baugh, Laura	333	416	66 (276%)	27 (69%)	25 (63%)	26 (66%)	26 (66%)	21 (66%)		
Benson, Christine	208	416	32 (132%)	53 (132%)	26 (66%)	43 (107%)	43 (107%)	35 (108%)		
Berry, Joshua	354	416	5 (20%)	14 (35%)	18 (45%)	28 (70%)	28 (70%)	24 (75%)		
Berry, William	354	416	27 (112%)	45 (112%)	27 (66%)	43 (107%)	43 (107%)	34 (107%)		
Bishop, Phillip	354	416	15 (60%)	24 (60%)	24 (60%)	24 (60%)	24 (60%)	29 (91%)		
Brady, Michael	374	416	24 (101%)	41 (101%)	39 (97%)	39 (97%)	39 (97%)	31 (97%)		
Brady, Richard	229	416	15 (62%)	25 (62%)	28 (70%)	37 (93%)	37 (93%)	30 (93%)		
Bryant, Connie	366	416	24 (101%)	41 (101%)	39 (97%)	39 (97%)	39 (97%)	31 (97%)		
Burton, Johnny	366	416	10 (41%)	17 (41%)	17 (42%)	17 (42%)	17 (42%)	17 (52%)		

Make sure your resources are utilized effectively for better control.

Deltek First Vision Essentials delivers the ultimate in visibility, control and insight for Project Managers and Resource Planners.

### **Deep Insight**

The benefits of the Deltek First Vision Essentials Planning solutions go beyond project and resource management, and extend throughout the entire firm with accurate, up-to-date information and seamless information transfer. Only Deltek Vision Essentials Planning develops deep insight into all areas of operations so that data is accurate, current and available on demand, truly turning information into knowledge.

Unlike disconnected systems that can't transform data into meaningful information, Vision Essentials Planning provides:

- Ultimate insight into critical questions, such as "What resources are over/under-utilized?" and "Do we have enough resources on staff if we close on a large opportunity?"
- Streamlined information, on-demand dashboards and deep analytics
- One centralized location for all project information
- All the tools users need to make strategic, well-placed decisions

### **Resource Planning Benefits not found in siloed solutions**

When loosely "stitching together" generic and siloed planning solutions, your firm misses out on getting the comprehensive project planning, resource management and budgeting capabilities it needs to be successful.

Deltek First Vision Essentials Planning includes:

#### **Project Planning**

Collects performance and utilization data at all project levels and then consolidates the information, enabling Project Managers, department leaders and senior management to operate successfully. With Project Planning, firms can assign, budget and forecast all resource hours, expense costs and consultant costs across the life cycle of a project.

#### **Resource Management**

Designed to work directly with Deltek Project Planning, Resource Management gives firms total control over resource utilization, budgeting and planning. Automated alerts and regular updates provide users with immediate feedback as plans change, giving firms the ability to evaluate impacted resources, affected utilization rates and budgets.

#### **Budgeting and Forecasting**

Grants firms in the planning stage with the ability to run "what-if" scenarios determining the number of hours required to complete a project. Additionally, estimated compensation for the primary firm and any consultants or sub-contractors can be included, giving a much more accurate, all-inclusive picture of a project's required time and cost.

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## Power of the Cloud

Deltek First Vision Essentials Planning delivers the ultimate in visibility, control and insight for Project Managers and Resource Planners within easy reach for today's small-to-mid-sized Professional Services firms. Moving away from the costly, time-consuming deployments of traditional solutions, this robust, cloud-based platform is deployed without the usual cash drains, hassles of on-site infrastructure and headaches of ongoing software maintenance.

So, what does this mean for your growing Professional Services firm? With Vision Essentials Planning, you get the crucial capabilities to connect your entire firm on a single system in a manner that is easy to buy, simple to own and secure to access from any location.

**For more information on how to better align your business, visit [deltek.com/VisionEssentialsPlanning](http://deltek.com/VisionEssentialsPlanning)**

The screenshot shows the 'Project Planning' software interface. The main window displays a Gantt chart and a data table for labor hours. The table has columns for months from August 2012 to August 2013. The rows are categorized by project and resource, showing 'Planned Hrs' and 'Actual Hrs'.

		Q3 2012	Q3 2012	Q4 2012	Q4 2012	Q1 2013	Q1 2013	Q1 2013	Q2 2013	Q2 2013	Q2 2013	Q3 2013	Q3 2013
		Aug 2012	Sep 2012	Oct 2012	Nov 2012	Dec 2012	Jan 2013	Feb 2013	Mar 2013	Apr 2013	May 2013	Jun 2013	Jul 2013
<b>Benson Research Lab</b>		<b>Gantt</b>											
	Baseline Hrs	284	260	258	271	272	215	206	218	206	226	206	215
	Planned Hrs	1,271	1,159	1,073	1,172	1,470	1,072	634	663	651	620	562	600
	Actual Hrs												
<b>Pre-Design</b>		<b>Gantt</b>											
	Baseline Hrs	2	1										
	Planned Hrs	815	741	654	688	686	480	75	79	74			
	Actual Hrs												
<b>Code Analysis</b>		<b>Gantt</b>											
	Baseline Hrs												
	Planned Hrs	719	655	654	688	686	480	75	79	74			
	Actual Hrs												
<b>Jensen, Chris</b>		<b>Gantt</b>											
	Baseline Hrs												
	Planned Hrs	202	185	185	193	193	195						
	Actual Hrs												
<b>Engineer</b>		<b>Gantt</b>											
	Baseline Hrs												
	Planned Hrs	82	75	74	79	78	79	75	79	74			
	Actual Hrs												

Compare planned hours against actual hours for better visibility into your projects.

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