

# Deltek First Vision Essentials 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.”*

» Durrant Performance Innovation

### **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 reporting tools, or place draining investments in up-front and maintenance costs for a comprehensive ERP solution. Either way, opting for generic 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 customer relationship management, project management and financial management?
- Was purpose built for professional service firms, not companies that sell products?
- 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™ CRM puts the proven capabilities of Deltek Vision and Deltek CRM – 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 First Vision Essentials CRM is the only solution that fully aligns business development with project and financial management through easy-to-use, easy-to-own, cloud-based software-as-a-service (SaaS).

### **Why project-based 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 Professional Services firms, generic CRM means ineffectual CRM.

### Complete Visibility

Because CRM is based on the Deltek First Vision Essentials platform, marketing and business development are fully and seamlessly integrated with the rest of the firm, including accounting and project management.

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

- 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.
- Stronger account management that results in better service to your clients

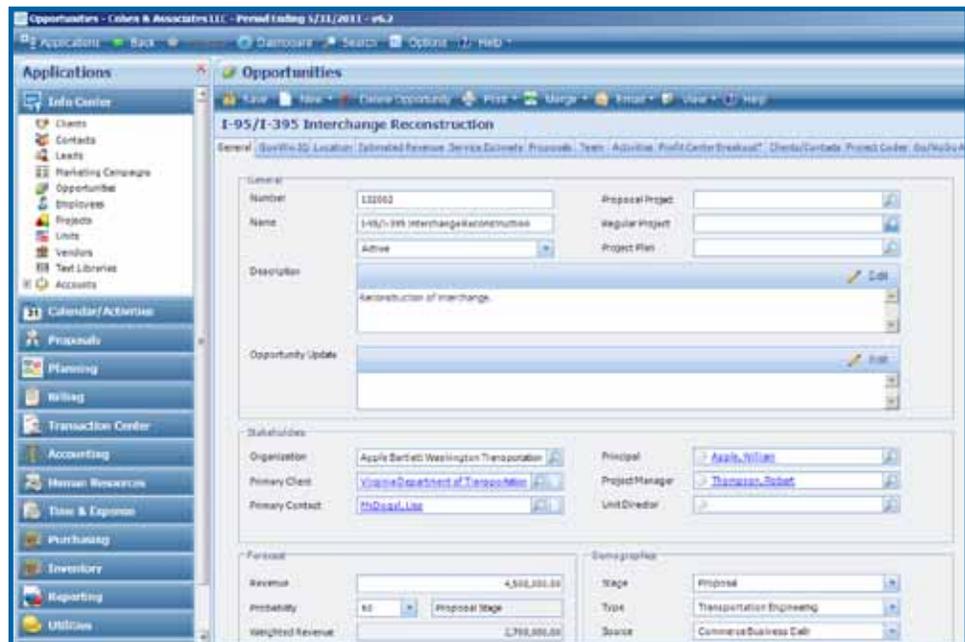
### Total Control

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

With Vision Essentials CRM, firms can:

- Track prospect and client activities, meetings, opportunities and even milestones
- View current pipeline, competitive factors and expected close dates on all opportunities
- Create alerts that notify key personnel and prompt proactive decision-making
- Better guide workflow and control finances, thus lowering risks and allowing for much more predictable and consistent margins

### Track and view details on all potential project opportunities



Business developers can accurately and quickly identify information and create proposals with just the mere click of a mouse; no more manual labor.

**Deep Insight**

The benefits of the Deltek First Vision Essentials CRM marketing solutions go beyond the marketing and business development departments, and extend throughout the entire firm with accurate, up-to-date information and seamless information transfer. Only Deltek Vision Essentials CRM 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 CRM provides:

- Streamlined information, on-demand dashboards, and deep analytics
- One centralized location for all project information
- Ultimate insight into critical questions, such as opportunities and resource availability/ allocation
- All the tools user need to make strategic, well-placed decision

**Benefits not found in traditional CRM solutions**

In generic traditional customer relationship management solutions you won't find the benefits of Vision Essentials CRM.

**Customer Relationship Management**

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

**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.

**Government Forms**

Just like with proposals, all the work and stress of filling out complicated, specific Government forms is instantly eliminated as users can automatically create and submit with a single click of a mouse.

**Track important activities for Clients such as emails, phone calls, meetings and tasks**

Completed	Type	Subject	Start Date	Priority	Owner	Contact	Contact Bus. Phone	Opportunity
<input type="checkbox"/>	Meeting	Client Visit	5/9/2012 2:00 P	High	Anderson, Steve	Collier, Paul	703.644.5803	Benson Research Lab
<input type="checkbox"/>	Phone Call	Conferece Call with Paul Collier	5/6/2012 2:00 PM	Medium	Apple, William	Collier, Paul	703.644.5803	Benson Research Lab
<input type="checkbox"/>	Email	Appointment	3/11/2012 1:00 P	Medium	Berry, William	Thomas, Christopher	617.826.6705	Atlantic Research Corp/2250
<input type="checkbox"/>	Phone Call	Discuss Opportunities	3/10/2012 11:30	Medium	Anderson, Steve	Collier, Paul	703.644.5803	White Plains Office Park
<input type="checkbox"/>	Phone Call	Appointment	5/11/2011 5:15 P	Medium	Apple, William	Collier, Paul	703.644.5803	Benson Research Lab
<input type="checkbox"/>	Meeting	Sell Game	12/10/2010 10:00	Medium	Anderson, Steve	Collier, Paul	703.644.5803	
<input type="checkbox"/>	Meeting	Client Visit	12/7/2010 12:00	Medium	Anderson, Steve	Collier, Paul	703.644.5803	AI
<input type="checkbox"/>	Phone Call	CRM Call	12/3/2010 5:00 P	Medium	Anderson, Steve	Collier, Paul	703.644.5803	
<input type="checkbox"/>	Phone Call	Discuss Current Project	12/3/2010 1:00 P	Medium	Anderson, Steve	Collier, Paul	703.644.5803	TR

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**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—meaning one robust tool to help your firm more successfully pursue and bid on projects.

**Federal Market Intelligence**

As an optional add-on to your Vision Essentials solution, Deltek’s Federal Market Intelligence provides one place for opportunity, federal agency, company, pricing and task order research. Purchase this subscription to eliminate all time-consuming processes associated with identifying sales opportunities and staying up-to-date with procurement changes.

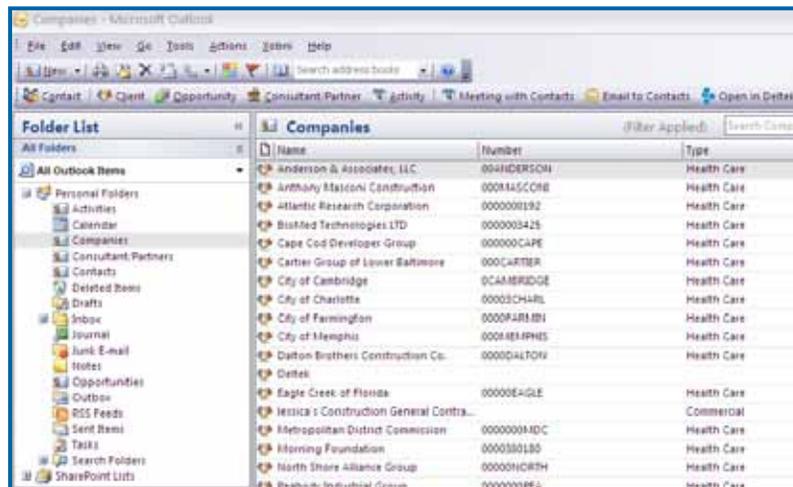
**Power of the Cloud**

Deltek First Vision Essentials CRM puts the proven capabilities of Deltek Vision – the most widely used professional services solution in the world—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 CRM, 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/VisionEssentialsCRM](http://deltek.com/VisionEssentialsCRM)**

**View, enter and update CRM records from Outlook**



Deltek (Nasdaq: PROJ) 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. Over 15,000 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](http://deltek.com)

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