

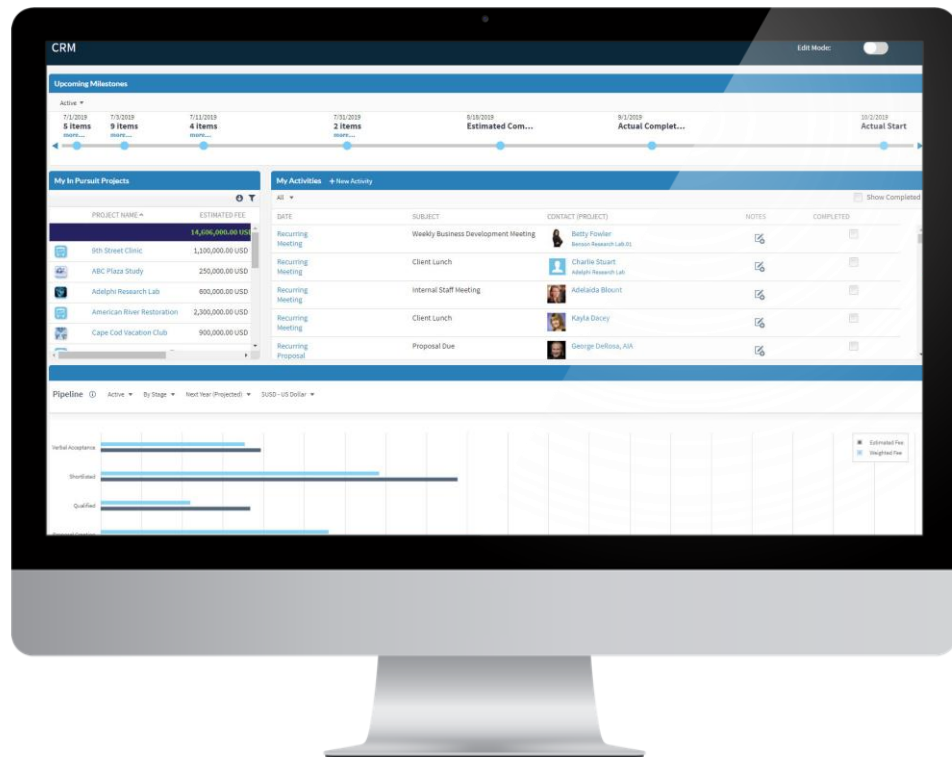
## Vantagepoint CRM

### Manage and nurture your client relationships, and develop engaging proposals to win more business

Your world revolves around clients and projects – finding them, pursuing them and winning them. With Vantagepoint CRM, your teams can identify potential projects or engagements earlier and pinpoint the clients worth pursuing. Access key information on your mobile device and connect with Outlook details to keep your clients and pursuits on track. Nurture client relationships when it matters most, build a strong pipeline, develop the right pursuits and better position your firm to win with Vantagepoint CRM.

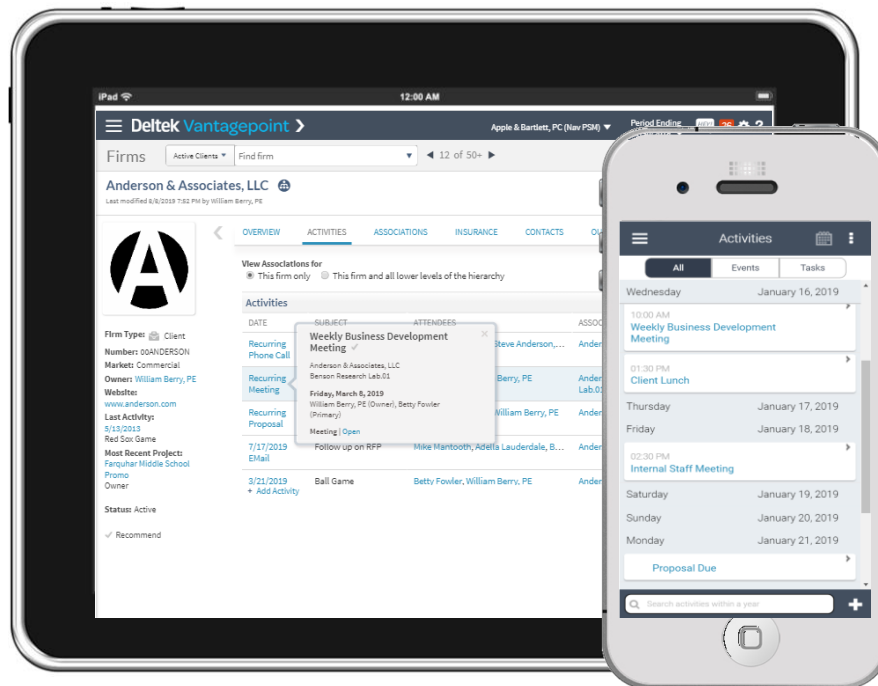
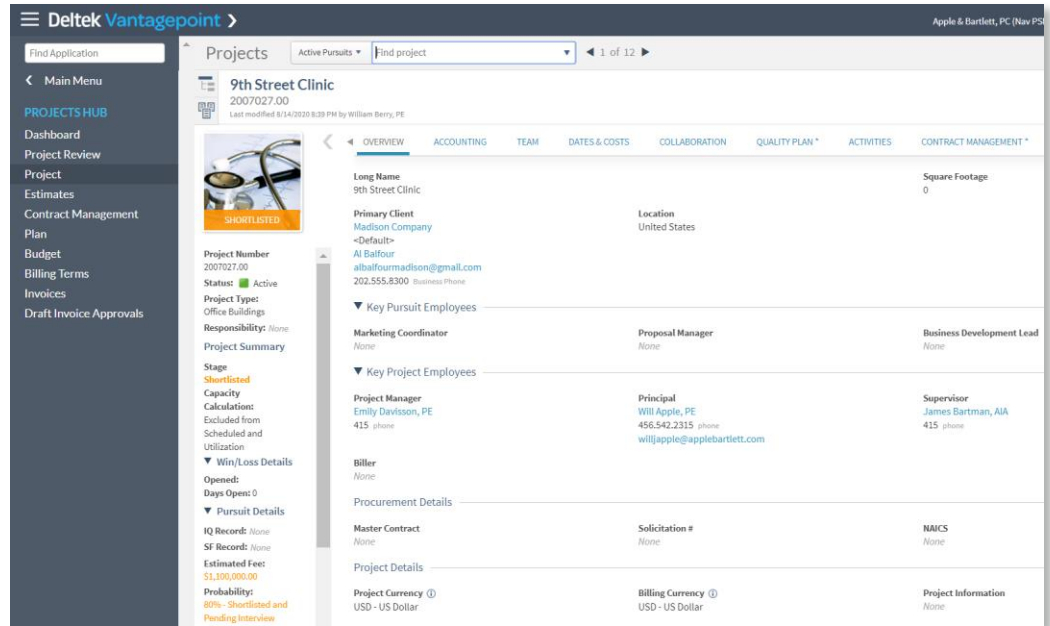
### Project-Centric CRM Built for the Way You Do Business

- Know you have enough pipeline to meet your goals
- Nurture client relationships when it matters most with alerts and notifications
- Deliver competitive and reliable project estimates and proposals to drive profitable projects
- Eliminate wasted time and double entry with all the information you need in a single view
- Collaborate around pursuits to make sure all the right people are driving the best proposal possible through conversations, tasks, shared documents and calendar events



## Qualify Leads and Pursuits

- Capture lead information as it happens with quick activity tracking on mobile device
- Add contacts, activities and projects with the Outlook Add-In
- Save time by searching directly within Outlook for client contact details in Vantagepoint
- Monitor your campaigns to find potential clients and follow up on leads

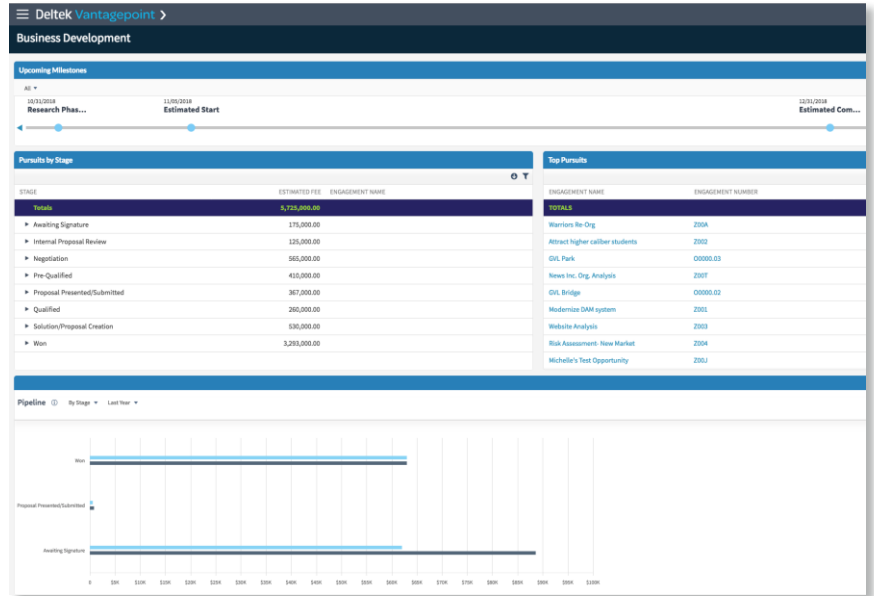


## Nurture Client Relationships

- Never miss another follow-up with alerts and notifications
- Easily identify which clients need attention with reporting
- Manage activities, clients and pursuits on mobile devices
- Proactively manage client relationships with the Outlook Add-In and an interactive calendar

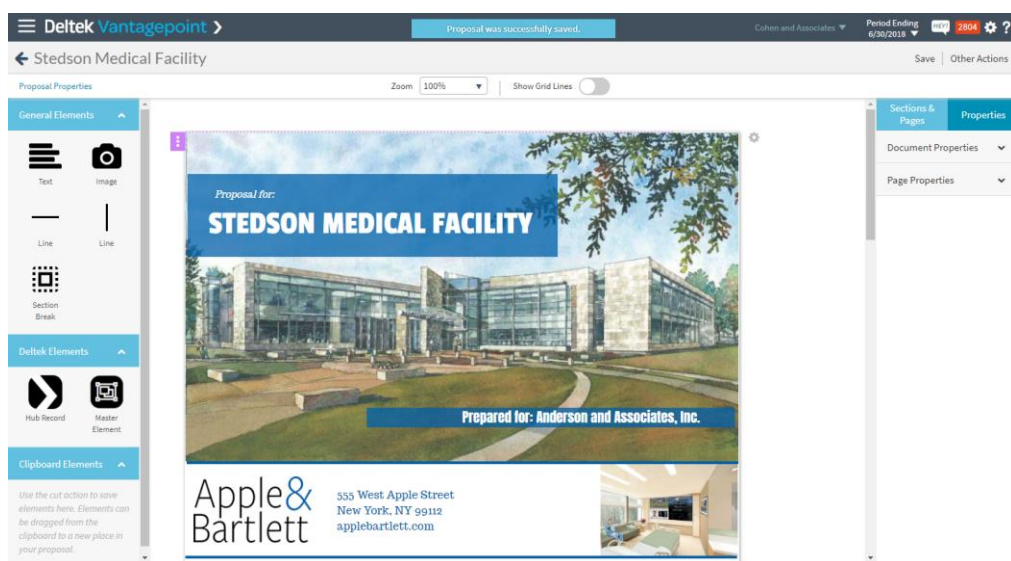
## Pursue the Right Projects

- Accurately pinpoint the right pursuits with instant access to pipeline management
- Determine which projects are best for your business to pursue
- Gain visibility into pipeline to identify gaps and develop an action plan
- Set milestones, deadlines and reminders to keep pursuits on track



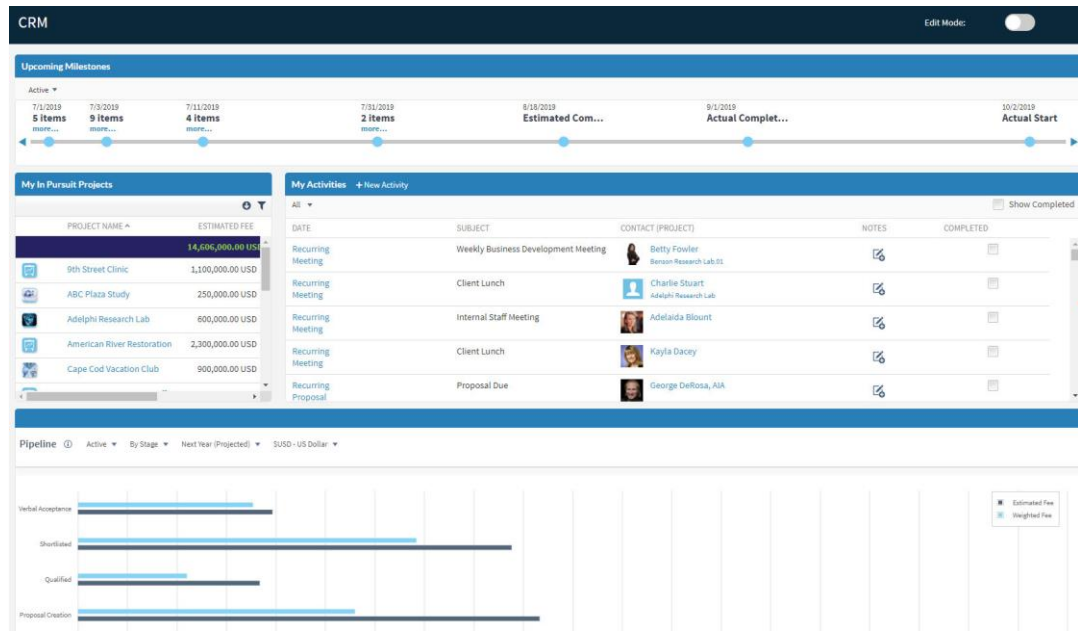
## Develop Impressive Proposals

- Empower staff with the self-service and interactive proposal editor tool
- Use drag and drop to easily add sections, pages and images with live views of progress
- Format with fonts and styles, add resumes and project details to deliver a professional and company-branded look
- Create proposal templates to quickly create the right proposal for the right project



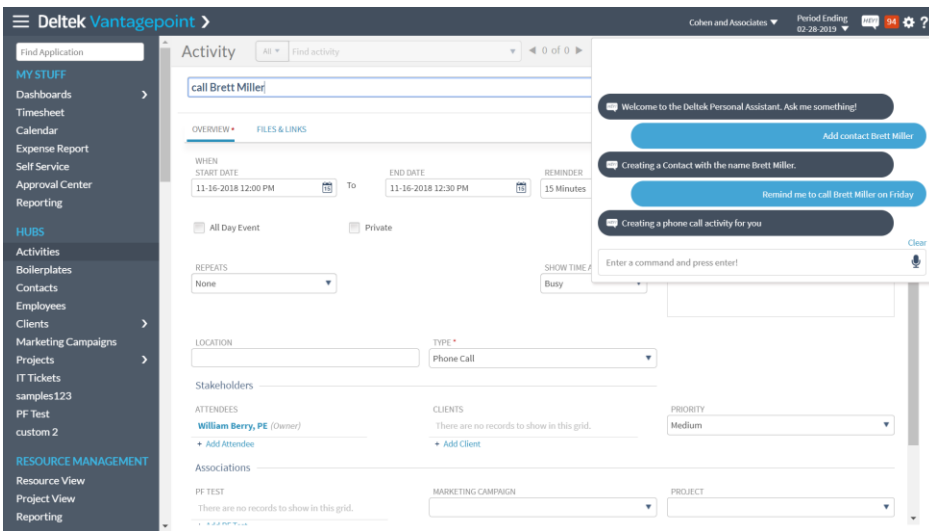
## Monitor Pipeline Health

- Create multiple dashboards so teams have all the information they need at their fingertips
- Identify gaps and develop an action plan to win more business
- Gain complete visibility into your client relationships to see where to invest your time
- Accurately forecast revenue and identify resource needs



## Automate Routine Tasks with “Hey Deltek”

- Save your team time, reduce training and increase staff usage
- Speak or type requests “Hey Deltek”
- Quickly set a reminder or follow-up task to always stay on top of your to-do list
- Create a new record or navigate to a specific record within different hubs



## Take CRM to the Next Level

- Integrate with your Deltek ERP solution to combine your business development, pipeline and client management data with financial and operational data for one version of the truth
- Integrate with other best-in-breed solutions, like Salesforce, to make sure your data is always connected, accurate and up-to-date
- A project-based CRM solution that centralizes project and pursuit information in one location, called the projects hub for easier navigation, access and simplified reporting
- Multiple dashboards including pipeline, milestones, activities, and pursuits provide insight into key performance indicators

## Have a question? Get in touch!

Learn how Deltek Vantagepoint CRM helps companies manage client relationships, track activities, build your pipeline, and create impressive proposals to win more business.

Visit [fullsailpartners.com/reach](https://fullsailpartners.com/reach) or contact us today at [info@fullsailpartners.com](mailto:info@fullsailpartners.com) and schedule a demonstration.  
888.552.5535