



# 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

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Upcoming I	Milestones						
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	PROJECT NAME *	ESTIMATED FEE	DATE	SUBJECT	CONTACT (PROJECT)	NOTES	COMPLETED
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CU	ABC Plaza Study	1,200,000.00 USD	Recurring Meeting	Client Lunch	Charlie Stuart Adalph Research Lab	E6	
	Adelphi Research Lab	600,000.00 USD	Recurring	Internal Staff Heeting	Adelaida Blount	E&	
00	American River Restoration	2,300,000.00 USD	Recurring	Client Lunch	Kayla Datey	16	6
8.9F	Cape Cod Vacation Club	900,000.00 USD	Recurring	Proposal Due	-		
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### **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

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Find Application	Projects Active	Pursuits * Find project	▼ ◀ 1 of 12 ►	
K Main Menu	9th Street Clin	ic		
	2007027.00 Last modified 8/14/2020 8:3	PM by William Berry, PE		
Dashboard		A OVERVIEW ACCOUNTING TEAM	DATES & COSTS COLLABORATION QUALITY PLAN* ACTIVITIE	S CONTRACT MANAGEMENT *
Project Review	A	A COUNTING TEAM		S CONTRACT MANAGEMENT
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Estimates		9th Street Clinic		0
Contract Management		Primary Client	Location	
Plan	SHORTLISTED	Madison Company	United States	
	and the second se	<default></default>		
Budget	Project Number . 2007027.00	Al Balfour albalfourmadison@gmail.com		
Billing Terms	Status: 📕 Active	202.555.8300 Business Phone		
Invoices	Project Type:	where an even some so		
Draft Invoice Approvals	Office Buildings	Key Pursuit Employees		
	Responsibility: None	Marketing Coordinator	Proposal Manager	Business Development Lear
	Project Summary	None	None	None
	Stage Shortlisted	▼ Key Project Employees		
	Capacity	Project Manager	Principal	Supervisor
	Calculation: Excluded from	Emily Davisson, PE	Will Apple, PE	James Bartman, AIA
	Scheduled and Utilization	415 phone	456.542.2315 phone willjapple@applebartlett.com	415 phone
	▼ Win/Loss Details	Biller		
	Opened: Days Open: 0	None		
	Pursuit Details	Procurement Details		
	IQ Record: None	Master Contract	Solicitation #	NAICS
	SF Record: None	None	None	None
	Estimated Fee: \$1,100,000.00	Project Details		
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	80% - Shortlisted and Pending Interview	USD - US Dollar	USD - US Dollar	None

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Owner: William Berry, PE Website:	Recurring Benson Research Lab.01 Meeting Friday, March 8, 2019	Berry, PE	Ander Lab.0:	Client Lunch	
www.anderson.com Last Activity:	William Berry, PE (Owner), I (Primary)	etty Fowler Villiam Berry, PE	Ander	Thursday	January 17, 2
5/13/2013 Red Sox Game	Proposal Meeting   Open			Friday	January 18, 2
Most Recent Project: Farguhar Middle School	7/17/2019 Follow up on RFP EMail	Mike Mantooth, Adella Lauderdale, B	Ander	02:30 PM	
Promo Owner	3/21/2019 Ball Game	Betty Fowler, William Berry, PE	Ander	Internal Staff M	eeting
	+ Add Activity		- 11	Saturday	January 19, 2
Status: Active			- 8	Sunday	January 20, 2
✓ Recommend			- 11	Monday	January 21, 2
			- 11	Proposal D	ue
			- 41	Q Search activitie	s within a year

### **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

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#### **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

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Proposal Presented/Submitted	367,000.00		GVL Bridge	00000.02
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#### **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

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#### **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

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#### 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 todo list
- Create a new record or navigate to a specific record within different hubs

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#### 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 or contact us today at info@fullsailpartners.com and schedule a demonstration. 888.552.5535