

Navigate Your Course to Success

Presented by: Wendy Gustafson, Full Sail Partners



Agenda

1. Resources
2. WebEx Instructions
3. Presentation: Navigate Your Course to Success
4. Questions

Keep your business
on *course*.

Full Sail Partners



Other resources from Full Sail Partners:

Events, Webinars and Resources

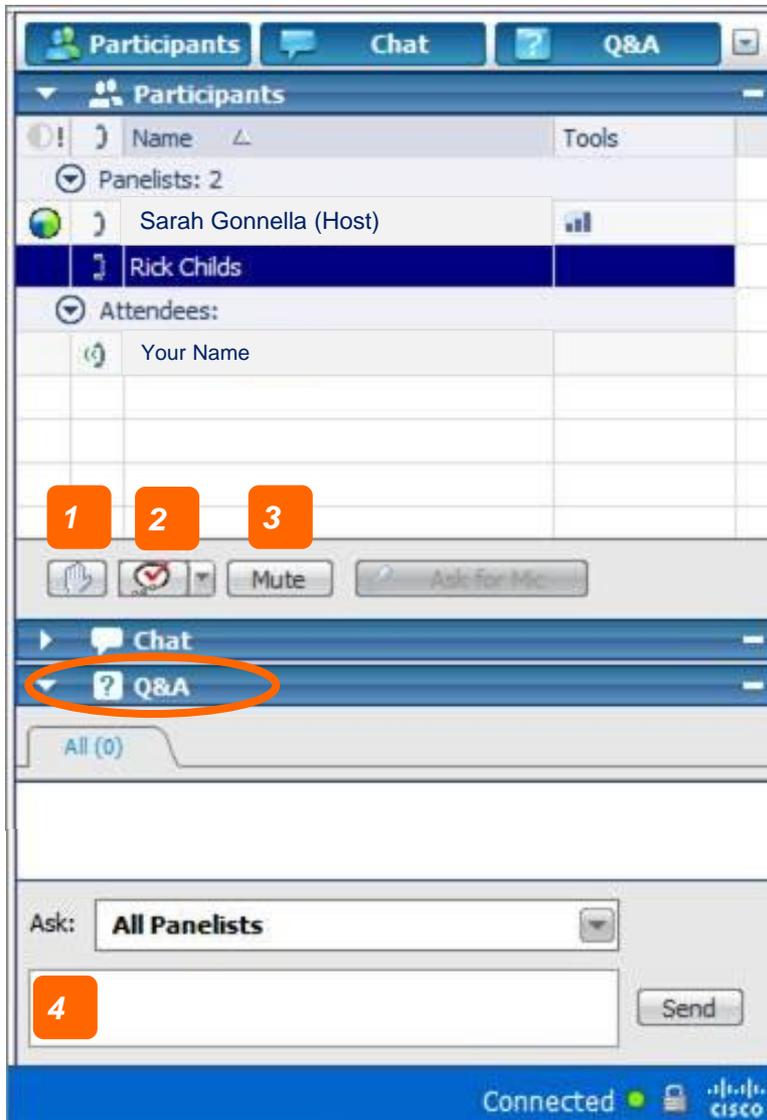
- **June 25 | 6 Bold Steps to Greater Profitability**
<http://bit.ly/1Rws6e9>
- **July 7 | Applying the Clarity 2014 Benchmarks**
<http://bit.ly/1Nicj1X>
- **July 8 | Advanced CRM: Better Budgeting, Visual Value**
<http://bit.ly/1LBNWv8>

Whitepapers & Publications

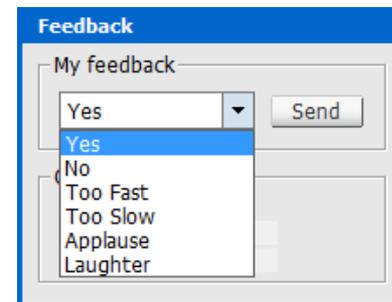
- **Client Feedback – Don't Wait 'Till It's Too Late!**
<http://bit.ly/1sElgYg>
- **Full Sail Partners Blog**
<http://bit.ly/1J5vZV>

**Join The Full Sail Partners' User Group Space on Kona:
Search for 'Full Sail Partners User Group' on Kona**





1. **Raise Hand** (be sure to click again to remove raised hand or feedback information)
2. **Feedback Tool** (use for yes/no questions or to provide the speaker feedback.)



3. **Mute** (mute yourself when you need to talk to someone in your office or put the line on hold)
4. **Q&A** (Type in the Q&A dialogue box [Not Chat] to ask a question. Be sure to choose All Panelist)



About the Presenter



Wendy Gustafson
WGustafson@fullsailpartners.com

Wendy oversees accounting and human resources at the firm. She previously, provided consulting and training services to Full Sail clients providing them insight on accounting processes and Deltek Vision functionality.

With 25 years of accounting experience, including 12 years in the architectural and engineering industry, she is always prepared to guide clients developing financial solutions and best practices using Deltek Vision®.



What Should I Consider

1. Industry Standards
2. Different Segments – Finance, Marketing, Operations, Employee
3. Data Currently Tracked
4. New Data needed



Industry Standards

1. Any Business can use:

- Profit and/or Gross Margin Percentage
- DSO (Days “sales” outstanding) or Avg Days Outstanding
- Staff Turnover
- Current Ratio

2. Professional Services:

- Utilization
- Labor Multiplier
- \$ per hour Billed



Different Areas

1. Accounting/Finance:

- Profit and/or Gross Margin Percentage
- Overhead Rate
- Current Ratio

2. Marketing

- Hit Ratio
- Leads Generated
- Days in Pipeline

3. Management

- DSO (Days “sales” outstanding) or Avg Days Outstanding
- Client Satisfaction
- Days in Backlog

4. Employees

- Utilization
- Staff Turnover
- Training



Data Needed

- What information is needed for your metric?
- What do you track now?
- Most Firms already track
 - › Revenue
 - › Expenses
 - › Accounts Receivable
 - › Payables
 - › Staff count
- Some Firms already track
 - › Real Backlog
 - › Billable Hours



What New Data Needed

- Do you have a consistent process for backlog updates?
- Do you track Billable hours for fixed fee jobs?
- Do you have consistent process for billing adjustments/write offs?
- Can you measure your pipeline?
- Can you measure your Hit Ratio
- Do you have an employee training program to keep up with industry changes?
- Do you survey your clients to get their feedback about your processes and performance?



What Can I Already Get Out of Vision



Manager/Project Information

PM Pr	AR Aging	Job-to-Date through 5/31/2013					Tuesday, June 23, 2015 11:43:40 AM			015
Apple & Bartlett Estimate Over	Invoice	Date	Balance	Current	31-60	61-90	91-120	Over 120	AM	Line 23, CV11: 11:27:16 AM
Project Manager 0000109.00 0021003.00 Total for Anderson Project Manager 2003005.00 Total for Apple & Bartlett Project Manager 2002005.00 Total for Concord Project Manager 1998001.00 Total for Sunkist 7.4.706 (ADMIN)	Project Manager Name: Anderson, Steve Billing Client Name: Atlantic Research Corporation Project Number: 0021003.00 Project 1 / Principal-In-Charge: Apple / Project Manager: Anderson 0000002 5/15/2013 500,000.00 500,000.00 Total for 0021003.00 500,000.00 500,000.00 Project Number: 20C2002.01 Novvis Telecom Headquarters / Principal-In-Charge: Bartlett / Project Manager: Anderson 0000953 6/4/2005 381,250.00 381,250.00 Total for 20C2002.01 381,250.00 381,250.00 Total for Atlantic Research Corporation 881,250.00 500,000.00 381,250.00									
	Billing Client Name: Sunkist Corporation Project Number: 2000005.00 The Mel Torne Auditorium / Principal-In-Charge: Apple / Project Manager: Anderson 0001004 4/30/2005 17,278.65 17,278.65 0001014 5/1/2005 14,576.29 14,576.29 Total for 2000005.00 31,854.94 31,854.94 Total for Sunkist Corporation 31,854.94 31,854.94									
	Billing Client Name: The Concord Corporation Project Number: 1999013.00 West Glen Elementary School Addition / Principal-In-Charge: Apple / Project Manager: Anderson 0000585 4/30/2005 2,842.00 2,842.00 0000605 5/31/2005 2,000.00 2,000.00 0000626 6/30/2005 750.00 750.00 Total for 1999013.00 5,592.00 5,592.00 Total for The Concord Corporation 5,592.00 5,592.00 Total for Anderson, Steve 918,696.94 500,000.00 418,696.94									
	7.4.706 (ADMIN) -								Page 2 of 15	



Employee Information

Employee List Wednesday, June 24, 2015
7:58:47 AM

Apple & Bartlett, PC

Employee Number	Full Name	Employee Type	Job Cost Rate	Target Ratio	Status	Hire Date	Raise Date
00001	Mr. William Richard Apple PE	Principal	43.0000	50.00	Active	1/1/1990	1/1/1999
00002	Mr. James Richard Bartlett AIA	Employee	47.0000	40.00	Terminated	1/1/1995	1/1/1998
00003	Ms. Grace Margaret Cohen AIA	Principal	1,400.0000	65.00	Terminated	1/1/2001	12/31/2003
00005	Mr. Robert Michael Lambert AIA	Employee	13.0000	75.00	Active	2/16/1995	1/1/1999
00007	Mr. Thomas John Spencer PE	Employee	21.0000	75.00	Active	4/15/1995	1/1/1999
00009	Mr. Herbert James Smithfield PE	Employee	24.0000	70.00	Active	4/12/1997	1/1/1999
00010	Ms. Lisa May Evans	Employee	27.0000	70.00	Active	5/17/1984	1/1/1999
00011	Mrs. Isaac Abraham Washington RLS	Employee	20.0000	70.00	Active	7/12/1997	1/1/1999
00012	Mr. Joseph David Nugent AIA	Employee	23.0000	75.00	Active	8/12/1996	1/1/1999
00013	Mrs. Laura Anne Baugh AIA	Employee	12.0000	80.00	Active	7/25/1995	1/1/1999
00014	Ms. Tina Marie Barrett	Employee	16.0000	70.00	Active	8/2/1995	1/1/1999
00015	Mr. Stephen Wade Willis	Employee	15.0000	75.00	Active	7/1/1994	1/1/1999

Utilization Report Tuesday, June 23, 2015
12:20:22 PM

Apple & Bartlett, PC As of 5/31/2013

	Standard Hours	Billable Hours	Overhead Hours	Target Ratio	Billable / Stand	Billable / Total	Prof Develop	Mkt	Other Overhead	Other
Labor Category: Architect										
00010 Evans, Lisa										
00023	MTD	184	80	60	70	43	57		60	
00024	YTD	872	80	60	70	9	57		60	
00101 Gray, Brenda										
00101	MTD	184	80	170	70	43	32		170	
00200	YTD	872	80	170	70	9	32		170	
Labor Category: Principals										
00001 Apple, William										
00203	MTD	184	230		50	125	100			
00301	YTD	872	598	336	50	69	64		336	40

74.706 (ADMIN) - * Ratios: C = Target, D = Direct / Std, A = Direct / Total, Std hours calculated as of 5/31/2013

Profit and Budget

Budget vs Actual

Tuesday, June 23, 2015

8:10:32 AM

Apple & Bartlett, PC

As of period 8/31/2013

	Q1 Actual	Q1 Budget	Q2 Actual	Q2 Budget	YTD Actual	YTD Remaining Budget	Year if Meet Budget	Annual Budget
Revenue								
Revenue	6,282,024	2,083,335	3,878,363	4,166,669	10,160,387	6,250,004	8,750,000	18,910,387
Total Revenue	6,282,024	2,083,335	3,878,363	4,166,669	10,160,387	6,250,004	8,750,000	18,910,387
Reimbursables								
Reimbursable Consultant Expense	107,485				107,485			107,485
Other Reimbursable Expenses	74,840				74,840			74,840
Total Reimbursables	182,325				182,325			182,325

Budget vs Actual

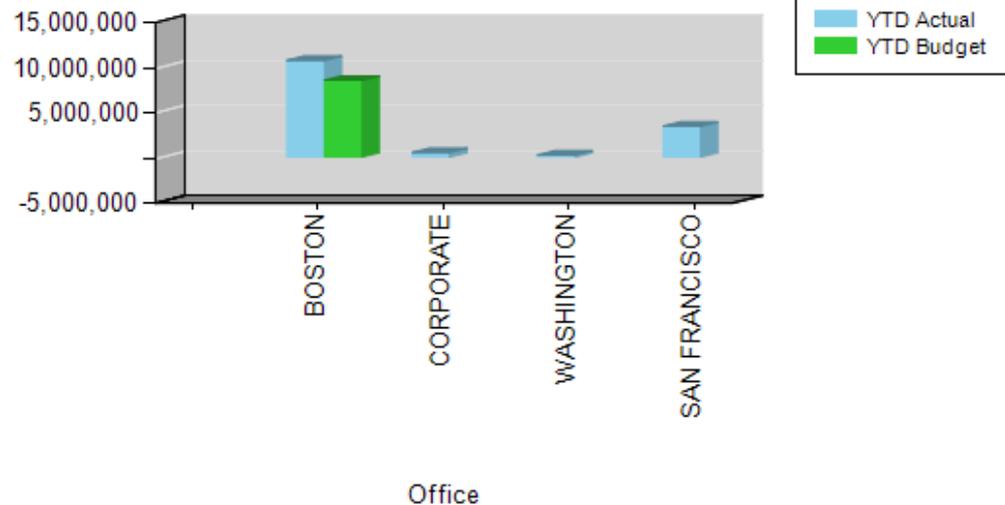
Direct Labor Apple & Bartlett, PC

As of period 8/31/2013

Direct Consultant Expense
Other Direct Expenses

Revenue Line

Administrative Labor
Payroll Benefits
Marketing Expense
Office Expenses
Legal and Financial Expense
Travel Expense
Depreciation and Amortization
Expense Recovery



7.4.706 (ADMIN) -



Consolidate Into Excel

PM	Metric	Jan	Feb	Mar	Apr	May
Anderson	Profit	15000	25000	30000	40000	70000
Anderson	AR	25000	30000	50000	50000	25000
Cohen	Pr	PM	Anderson			
Cohen	AR					

Row Labels	Sum of Jan	Sum of Feb	Sum of Mar	Sum of Apr	Sum of May
AR	25,000.00	30,000.00	50,000.00	50,000.00	25,000.00
Profit	15,000.00	25,000.00	30,000.00	40,000.00	70,000.00
Grand Total	40,000.00	55,000.00	80,000.00	90,000.00	95,000.00



What Would a Metric Info Center Look Like?



Metric Tab

Delttek Vision - Company Metrics - Acme Environmental Engineers - Period Ending 7/31/2014 - v7.3

Show Navigation Back Forward Dashboard Navigator Kona Search Options Help Log Off

Company Metrics Search

Save New Delete Company Metric Print List View Help

062014

Metrics Balance Sheet, Backlog and other Income Statement

Month End Date 6/30/2014 Number 201406 Name 062014

	Monthly Goal	Current	YTD			Monthly Goal	Current	YTD			
Financial					Operations						
Operating Profit	8.00	6.19	4.56	%	Operating Profit/Net Revenue	Avg Age AR	67.00	54.75	Days	AR Balance/(Avg Net Rev/365)	
Revenue Growth Rate	3.00	1.25	2.50	%	Inc/Dec Net Revenue/Net Revenue	Days in Backlog	75.00	91.25	Days	Backlog/(Avg Net Rev/365)	
Overhead Rate	160.00	152.60	161.05		Overhead/Direct Labor	Client Satisfaction Response	75.00	40.00	%	Survey Responses/Sent	
Current Ratio	2.25	4.348	%	Current Assets/Current Liabilities							
Marketing					Employee						
Hit Ratio	30.00	20.00	30.00	%	Oppts Sold/(Oppts Sold, Lost, Abandoned)	Industry Training Hours	10.00	7.00	Hrs	Hours/Employee	
Leads Generated	75.00	10.00	40.00	%	Number of Leads Generated	Labor Utilization	67.00	56.82	%	Direct Labor/Total Labor	
Days in Pipeline	75.00	0.40	28.00	Days	Pipeline/Avg Revenue	Net Direct Labor Multiplier	3.00	2.68		Net Revenue/Direct Labor	
						Net Payroll Multiplier	2.00	1.523		Direct Labor Multiplier * Labor Utilization	

Ready



Data Tabs

The screenshot displays a software application window titled "Deltek Vision - Company Metrics - Acme Environmental Engineers - Period Ending 7/31/2014 - v7.3". The main content area is titled "Company Metrics" and shows a data tab for "Income Statement" for the period "062014".

The interface includes a sidebar on the left with a tree view of metrics categories such as Cash, Accounts Receivable, WIP, Other Current Assets, Current Assets, Net Computer Equip, Net PPE, Field Equipment, Net Real Estate, Leasehold Improvements, Other Assets, Long-Term Assets, Total Assets, Accounts Payable, Deferred Taxes, Line of Credit/Borrowing, Current Portion LTD, Other Current Liab, Current Liab, Long Term Portion LTD, Other Liab, Long Term Liab, Total Liab, Equity Capital, Profit & Retained Earnings, and Liab and Equity.

The main data table is organized into two sections. The first section lists various revenue and cost items with columns for Current, YTD, and 12 Month Roll. The second section lists labor and other expenses with columns for Current, YTD, and 12 Month Roll.

	Current	YTD	12 Month Roll		Current	YTD	12 Month Roll
Revenue	72,000.00	500,000.00	1,000,500.00	Total Labor	44,000.00	283,225.00	153,227.00
Outside Prof Service	5,000.00	100,000.00	125,000.00				
Construction cost							
Testing							
Survey and Mapping							
Equipment Usage							
Bonding/Insurance							
Project Furnishing/Equip							
Project Travel							
Models/Renderings/Photo							
Supplies							
Printing							
Other Direct/Reimb							
NetRevenue	67,000.00	400,000.00	875,500.00				
Direct Labor	25,000.00	153,225.00	318,400.00				
Direct Computer Costs							
Cont margin	42,000.00	246,775.00	557,100.00				
Payroll Taxes	3,500.00	24,500.00	42,000.00				
Vacation Sick-Holiday	3,000.00	21,000.00	36,000.00				
Group Insurance	5,000.00	35,000.00	60,000.00				
Annual Pension Expense							
All Other Finge Benefits							
Indirect Labor (non BD)	10,000.00	60,000.00	102,857.00				
Indirect Computer Costs							
Cost of Space	2,500.00	17,500.00	30,000.00				
Telephone	200.00	1,400.00	2,400.00				
Prof. Liab. Insurance	1,500.00	10,500.00	18,000.00				
General Insurance	300.00	2,100.00	3,600.00				
Int on Borrowed Capital							
Bad Debt Expense							
Total	1,000.00	7,000.00	12,000.00				



Viewing Data

1. List Views work in UDICs just like in any other Info Center



The screenshot displays the 'Company Metrics' application window. The title bar reads 'Company Metrics'. Below the title bar is a menu bar with options: Save, New, Delete Company Metric, Print, Detail View, and Help. The main content area shows a table with the following data:

Number	Name	Month End Date	YTD Revenue Growth Rate	YTD Overhead Rate	YTD Operating Profit	YTD Days in Backlog	YTD Net Payroll Mult	YTD Direct Labor Mult	YTD Labor Utilization
2014Goals	2014 Goals		3.00	160.00	8.00	90.00	30.00	3.00	70.00
201401	201401	1/31/2014	3.25	170.00	8.00	75.00	30.00	2.75	60.00
201402	201402	2/28/2014	5.00	169.00	6.00	75.00	30.00	2.78	50.00
201403	201403	3/31/2014	2.25	165.00	7.00	75.00	30.00	2.76	30.00
201404	042014	4/30/2014	3.00	160.00	8.25	78.00	50.00	2.78	50.00
201405	201405	5/31/2014	2.75	162.00	8.50	78.00	30.00	2.79	55.00
201406	062014	6/30/2014	2.25	167.00	8.40	80.00	30.00	2.79	65.00
201407	201407	7/31/2014	3.75	160.00	8.25	85.00	30.00	3.00	70.00



Vision Reports Work in UDICs Also

Marketing YTD Metrics

Acme Environmental Engineers

Friday, October 17, 2014
3:17:44 PM

Name	Pipeline	Days in Pipeline	Leads Generated	Opportunites Sold	Opportuniteis Total	Hit Ratio
2014 Goals		30.00	40.00			50.00
201401	75,000.00	30.00	50.00	10.00	10.00	40.00
201402	75,000.00	30.00	50.00	15.00	25.00	40.00
201403	50,000.00	30.00	50.00	30.00	55.00	40.00
201404	30,000.00	30.00	50.00	50.00	105.00	40.00
201405	30,000.00	30.00	50.00	63.00	168.00	40.00
201406	60,000.00	28.00	40.00	75.00	243.00	30.80
201407	75,000.00	30.00	50.00	80.00	320.00	40.00

v7.3.702 (ADMIN) - Page 1 of 1



Things to Think About

1. Data needed
2. Input
 - Manual?
 - Programed?
3. Process in place?



Great – So, How Do I Use Vision

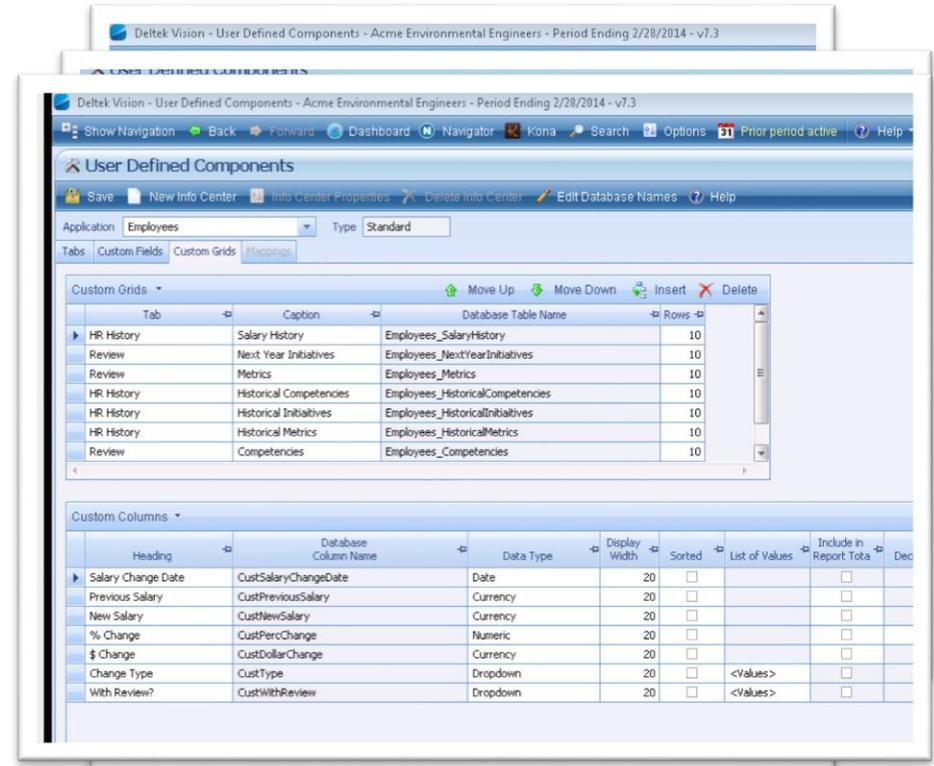
1. Vision's Open Architecture lets you do more:

- User Defined Info Center
- Workflows



How to Set Up Customization

- On the Tabs page, Add any Tabs needed
- On the Custom Fields page, add Fields needed
- On the Custom Grids and Grid Fields, add the Grid and Grid Field needed



How to Set Up Customization

Data Types

Character
Checkbox
Currency
Date
Numeric
URL

Function

A field that is stored as a text field and limited to 255 characters
A checkbox
A numeric field that displays to two decimal points
A date field
A numeric field that displays to 9 decimal points
Creates a hyperlink to a site outside Vision or an Email

The following "Data Types" create a hyperlink into the applicable info centers:

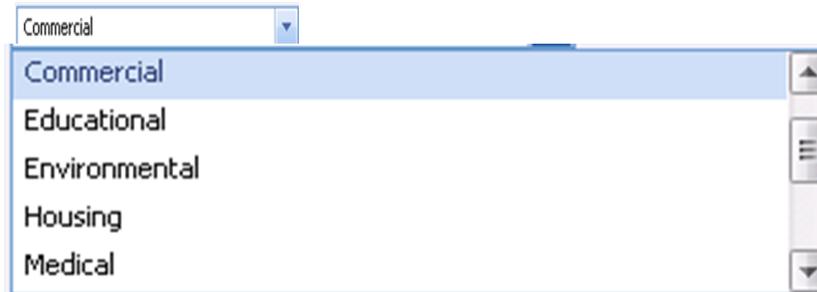
Account	Marketing Campaign
Client	Opportunity
Vendor	Organization
Employee	Project
Lead	Text Library



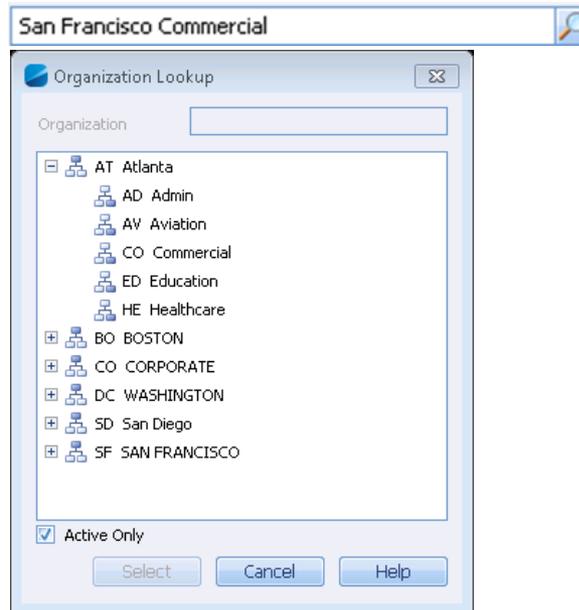
How to Set Up Customization

The following "Data Types" allows you to create custom lists:

Drop Down:



Look Up:



User Defined Info Center

- 1. A
- 2. U

The screenshot displays the Deltek Vision software interface. The main window title is "Deltek Vision - User Defined Components - Acme Environmental Engineers - Period Ending 7/31/2014 - v7.3". The navigation pane on the left lists various modules, with "User Defined Components" highlighted. The main area shows the "User Defined Components" configuration screen, which includes a toolbar with "Save", "New Info Center", "Info Center Properties", "Delete Info Center", and "Edit Database Name". Below the toolbar are fields for "Application" and "Type", and tabs for "Custom Fields", "Custom Grids", and "Mappings". A table with columns "Tab Label" and "Tab Type" is visible. An "Info Center Properties" dialog box is open in the foreground, containing the following fields:

- Info Center Labels
 - Singular: Company Metric
 - Plural: Company Metrics
- Help URL: www.ourintranet.com
- Automatically Include: Activities Grid Files Grid
- Database Table Name: UDIC_CompanyMetric

Buttons for "Save", "Cancel", and "Help" are located at the bottom of the dialog.



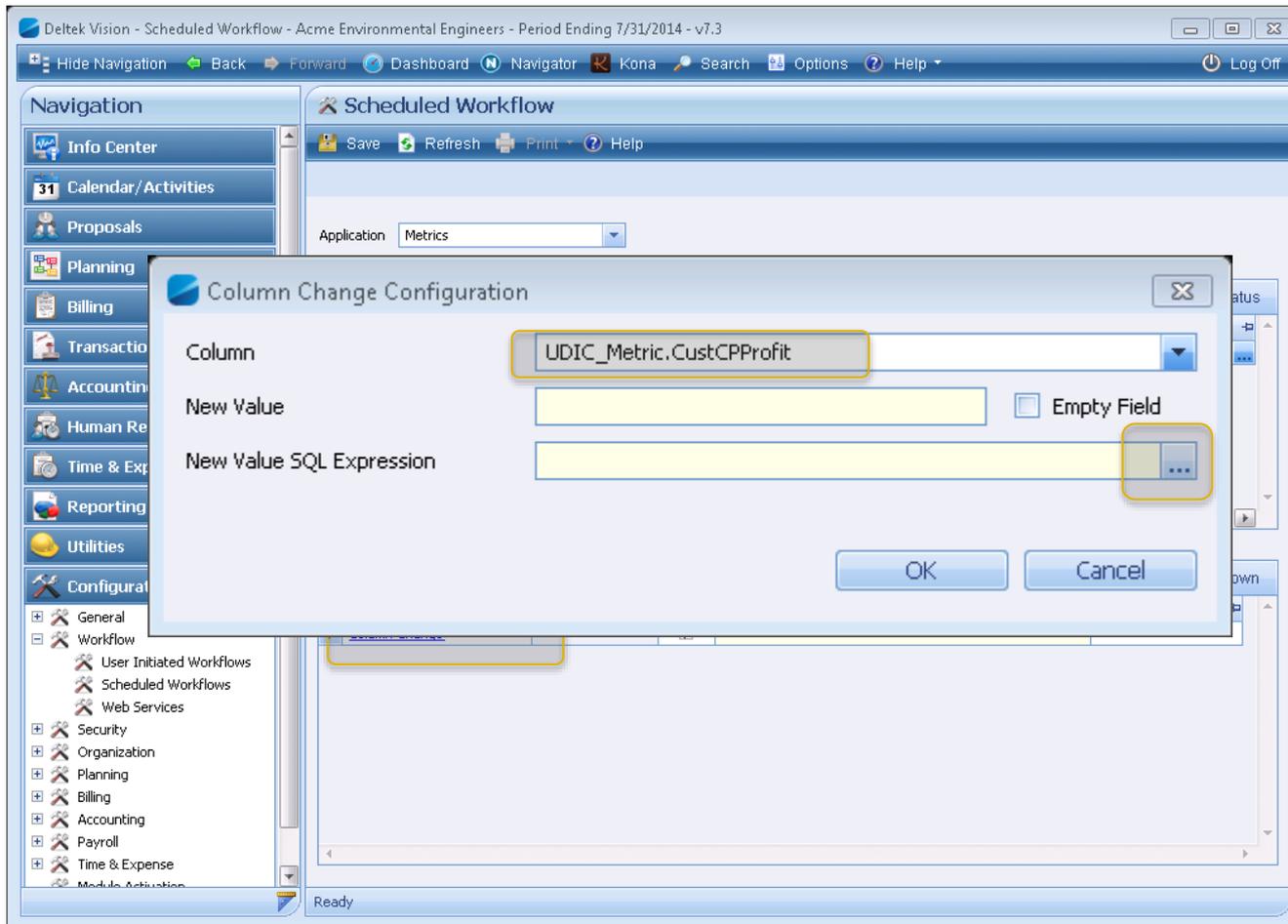
Calculations are Performed via Workflows

- 1.
- 2.

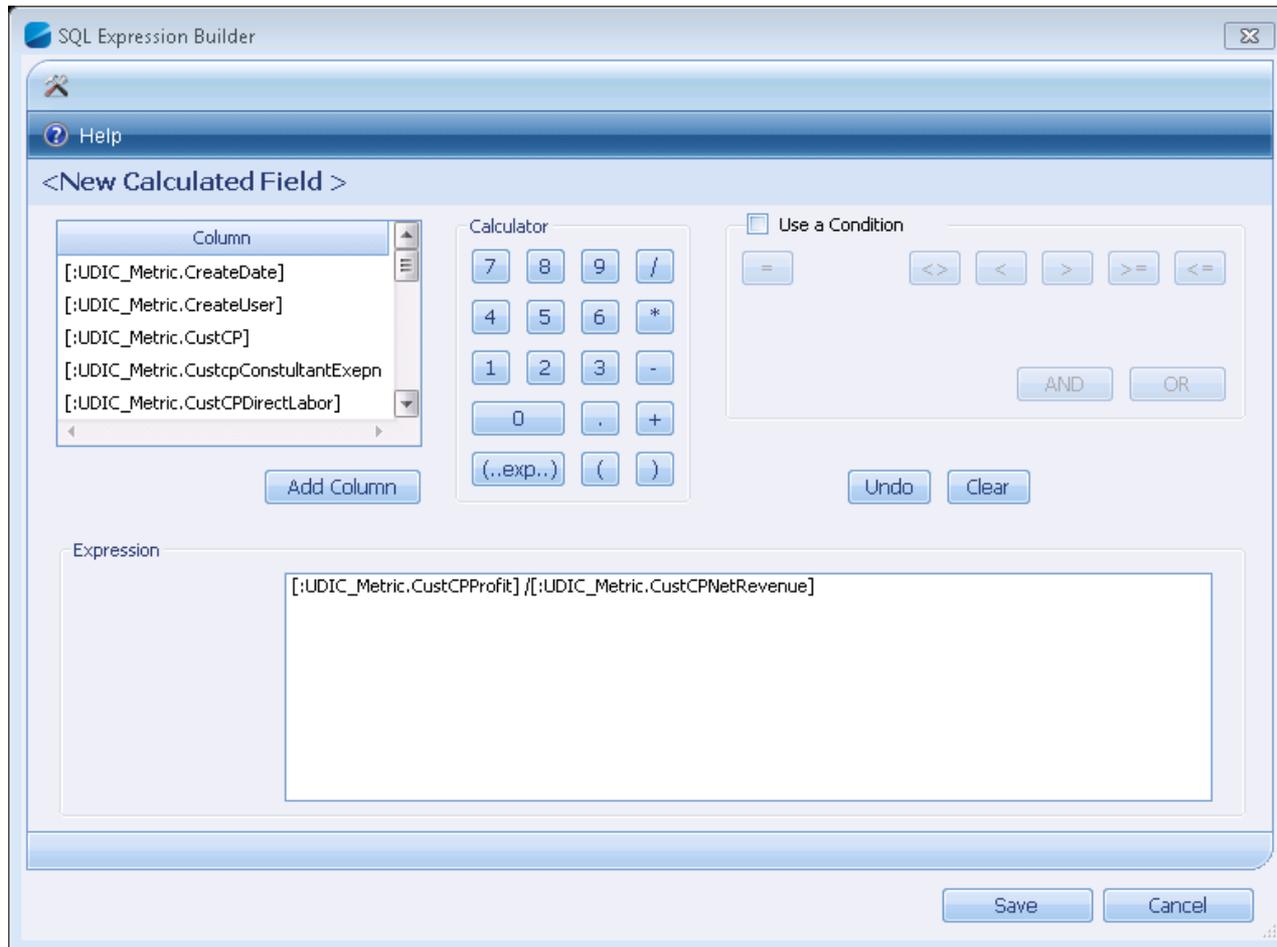
The screenshot displays a software interface for configuring workflows. On the left is a navigation pane with a tree view under 'Configuration'. The 'Scheduled Workflows' item is selected and highlighted with a yellow box. The main area is titled 'Scheduled Workflows' and shows a table with columns: Workflow Table, Level, Schedule, Description, and Conditions. A single entry is visible: '[Metric Record]' with a checkbox in the 'Schedule' column and the description 'Calculate Metrics'. The 'Conditions' column contains '<conditions define ...'. Below this table is an 'Actions' table with columns: Action, Level, Active, Description, and Conditions. The status bar at the bottom indicates 'Ready'.



Calculations are Performed via Workflows



Calculations are Performed via Workflows



Calculations are Performed via Workflows

The screenshot displays the 'Scheduled Workflow' configuration interface in Deltek Vision. The window title is 'Deltek Vision - Scheduled Workflow - Acme Environmental Engineers - Period Ending 7/31/2014 - v7.3'. The application is set to 'Metrics'. The 'Scheduled Workflows' table contains one entry: '[Metric Record]' with a description of 'Calculate Metrics' and conditions '<conditions defined>'. The 'Actions' table contains one entry: 'Column Change' with a description of 'Update Operating PProfit' and an active status checked.

Application: Metrics

Scheduled Workflows

Workflow Table	Level	Schedule	Description	Conditions	Schedule	Last R
[Metric Record]		<input type="checkbox"/>	Calculate Metrics	<conditions defined>		

Actions

Action	Level	Active	Description	Conditions
Column Change		<input checked="" type="checkbox"/>	Update Operating PProfit	...

Ready



Automate More Using Stored Procedures

1. Vision's Open Architecture lets you do more:

- Summary GL /PR Tables
- Stored Procedures



Summary PR/Summary GL

The image displays two overlapping 'Schedule' dialog boxes. The left dialog is in the 'Main' tab, showing process configuration. The right dialog is in the 'Parameters' tab, showing recurrence settings.

Left Dialog (Main Tab):

- Process Queue: Process
- Queue Status: Running
- Description: Refresh Summary Tables
- Start After: 10/16/2014 3:30 PM
- Submit to a Profile:
- Place Process on Hold:
- Send Process Status Email Alert to Submitter:
- Options... button

Right Dialog (Parameters Tab):

- Recurring Activity:
- Recurrence Type: Daily
- Recurrence Pattern:
 - Recur Every 1 Days:
 - Every Weekday:
- Recurrence End:
 - No End Date:
 - End Date:
- Options... button
- OK, Cancel, Help buttons



Stored Procedures to Update all Data

1. **Stored Procedures requires advanced programming knowledge and SQL experience.**
2. **When doing any functions using stored procedures – create the procedure in test first**
3. **Only allow qualified personnel in your database**



Stored Procedures can Pull Data Into Data Tabs

The screenshot displays the 'Company Metrics' window in Deltek Vision. The window title is 'Deltek Vision - Company Metrics - Acme Environmental Engineers - Period Ending 7/31/2014 - v7.3'. The main content area shows a table with the following data:

	Current	YTD	12 Month Roll		Current	YTD	12 Month Roll
Revenue	72,000.00	500,000.00	1,000,500.00	Total Labor	44,000.00	283,225.00	153,227.00
Outside Prof Service	5,000.00	100,000.00	125,000.00				
Construction cost							
Testing							
Survey and Mapping							
Equipment Usage							
Bonding/Insurance							
Project Furnishing/Equip							
Project Travel							
Models/Renderings/Photo							
Supplies							
Printing							
Other Direct/Reimb							
NetRevenue	67,000.00	400,000.00	875,500.00				
Direct Labor	25,000.00	153,225.00	318,400.00				
Direct Computer Costs							
Cont margin	42,000.00	246,775.00	557,100.00				
Payroll Taxes	3,500.00	24,500.00	42,000.00				
Vacation Sick Holiday	3,000.00	21,000.00	36,000.00				
Group Insurance	5,000.00	35,000.00	60,000.00				
Annual Pension Expense							
All Other Finge Benefits							
Indirect Labor (non BD)	10,000.00	60,000.00	102,857.00				
Indirect Computer Costs							
Cost of Space	2,500.00	17,500.00	30,000.00				
Telephone	200.00	1,400.00	2,400.00				
Prof. Liab. Insurance	1,500.00	10,500.00	18,000.00				
General Insurance	300.00	2,100.00	3,600.00				
Int on Borrowed Capital							
Bad Debt Expense							
Telephone & Ed	1,000.00	7,000.00	13,000.00				



While Standard Workflows Update Metrics

Delttek Vision - Company Metrics - Acme Environmental Engineers - Period Ending 7/31/2014 - v7.3

Show Navigation Back Forward Dashboard Navigator Kona Search Options Help Log Off

Company Metrics

Search

Save New Delete Company Metric Print List View Help

062014

Metrics Balance Sheet, Backlog and other Income Statement

Month End Date 6/30/2014 Number 201406 Name 062014

	Monthly Goal	Current	YTD		Monthly Goal	Current	YTD	
Financial				Operations				
Operating Profit	8.00	6.19	4.56	%	Operating Profit/Net Revenue			
Revenue Growth Rate	3.00	1.25	2.50	%	Inc/Dec Net Revenue/Net Revenue			
Overhead Rate	160.00	152.60	161.05		Overhead/Direct Labor			
Current Ratio	2.25		4.348	%	Current Assets/Current Liabilities			
Marketing				Employee				
Hit Ratio	30.00	20.00	30.00	%	Oppts Sold/(Oppts Sold, Lost, Abandoned)			
Leads Generated	75.00	10.00	40.00	%	Number of Leads Generated			
Days in Pipeline	75.00	0.40	28.00	Days Pipeline/Avg Revenue				
					Avg Age AR	67.00	54.75	Days AR Balance/(Avg Net Rev/365)
					Days in Backlog	75.00	91.25	Days Backlog/(Avg Net Rev/365)
					Client Satisfaction Response	75.00	40.00	28.00 % Survey Responses/Sent
					Industry Training Hours	10.00	7.00	15.00 Hrs Hours/Employee
					Labor Utilization	67.00	56.82	54.10 % Direct Labor/Total Labor
					Net Direct Labor Multiplier	3.00	2.68	2.61 Net Revenue/Direct Labor
					Net Payroll Multiplier	2.00	1.523	1.412 Direct Labor Multiplier * Labor Utilization

Ready



Other Options - VPM



What Are Analysis Cubes and VPM

The Deltek Vision Performance Management (VPM) module is intended to provide your firm with easily accessible, graphical performance data based on your existing Vision data. VPM is intended as a complement to, not a replacement of, your current Vision reporting functions/schedules.

VPM comes with 2 components:

- 1. Analysis Cubes:** Analysis cubes are partially pre-calculated data that is structured to allow access to your transactional data while still providing efficiency in processing. The Analysis Cubes do not provide access to your LIVE data but are calculated on a schedule (usually nightly) that you can control for your company needs.
- 2. Presentation:** The Presentation component is a business intelligence solution from Tableau. This solution accesses the analysis cubes (standard use) or SQL data (advanced use) to allow powerful graphical representations of your company's position for the metrics that mean most to you.



What Are Analysis Cubes and VPM

1. Your data is entered and maintained in the Vision system

Cohen, Grace

Timesheet Hours

Period Ending Period Status Timesheet Status

Project	Project Name	Phase	Reg	Ovt	Ovt-2	Tue 1/1	Wed 1/2	Thu 1/3	Fri 1/4	Sat 1/5	Sun 1/6	Mon 1/7	Tue 1/8	Wed 1/9	Thu 1/10	Fri 1/11	Sat 1/12	Sun 1/13	Mon 1/14	Tue 1/15	
▶ Vacation	Vacation																				
Sick Leave	Sick Leave																				
Holiday	Holiday		8.00			8.00															
2003005.00	Adelphi Research Lab	1PD	67.00				8.00	8.00	8.00			7.00	7.00	7.00	3.00	7.00				6.00	6.00
0000007.00	General Administration	1EN	13.00									1.00	1.00	1.00	5.00	1.00				2.00	2.00



What Are Analysis Cubes and VPM

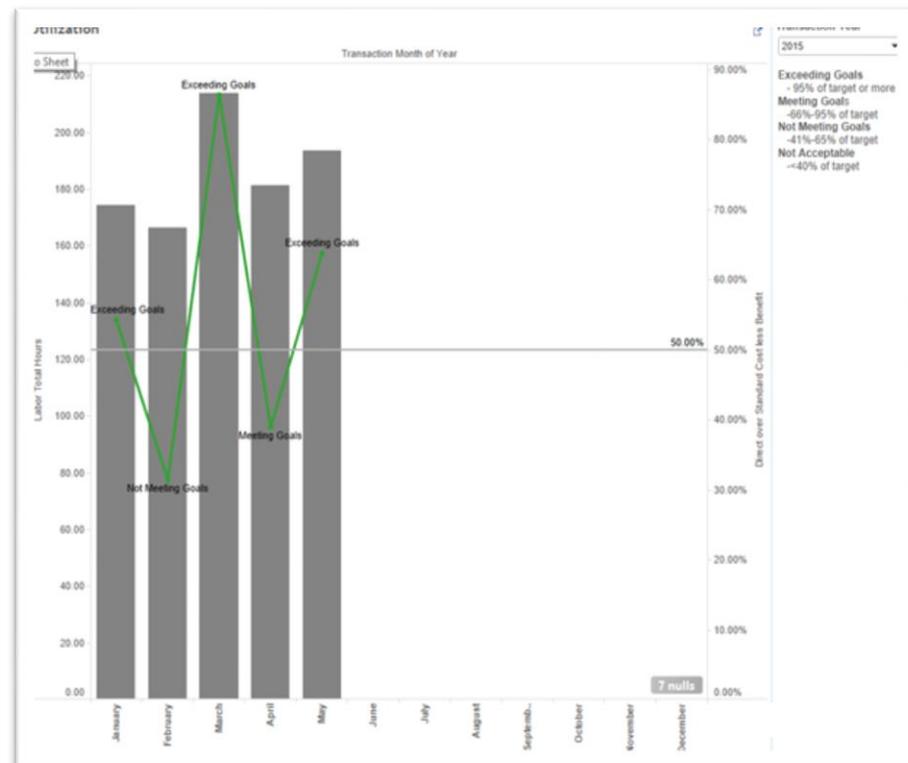
1. Your data is entered and maintained in the Vision system
2. Data is stored in a table format. Analysis Cubes summarizes the data – much like pivot tables in Excel

Employee	Date	Hours	Project	Project Type		
				Benefit	Indirect	Regular
John Smith	1/1/2015		8 Holiday			
Rachel Jones	1/1/2015		8 Holiday			
Grace Cohen	1/1/2015		8 Holiday			
John Smith	1/2/2015		5 New Belgium			
Rachel Jones	1/2/2015		3 James Brown Soul C			
Grace Cohen	1/2/2015		8 New Belgium			
John Smith	1/2/2015		3 Admin			
Rachel Jones	1/2/2015		5 Admin			
Grace Cohen				8	86	250
January						
Admin					26	
Holiday				8		
New Belgium						150
February						
Admin					60	
New Belgium						100
John Smith				8	161	175
January						
Admin					76	
Holiday				8		
New Belgium						100



What Are Analysis Cubes and VPM

1. Your data is entered and maintained in the Vision system
2. Data is stored in a table format. Analysis Cubes summarizes the data – much like pivot tables in Excel
3. VPM Displays the data in Vision in graphical (if desired) format



What Are Analysis Cubes and VPM

Analysis Cubes are separate from VPM and Vision. They are accessible from programs such as Excel. They work like pivot tables.

The screenshot shows an Excel spreadsheet with a PivotTable. The PivotTable Fields task pane on the right is configured as follows:

- SHOW FILTERS:** (All)
- Columns:** Billed, Received (for each quarter)
- Rows:** Project Manag.
- Filters:** Fiscal Year - Q...
- Values:** Received, Billed

The PivotTable data is summarized below:

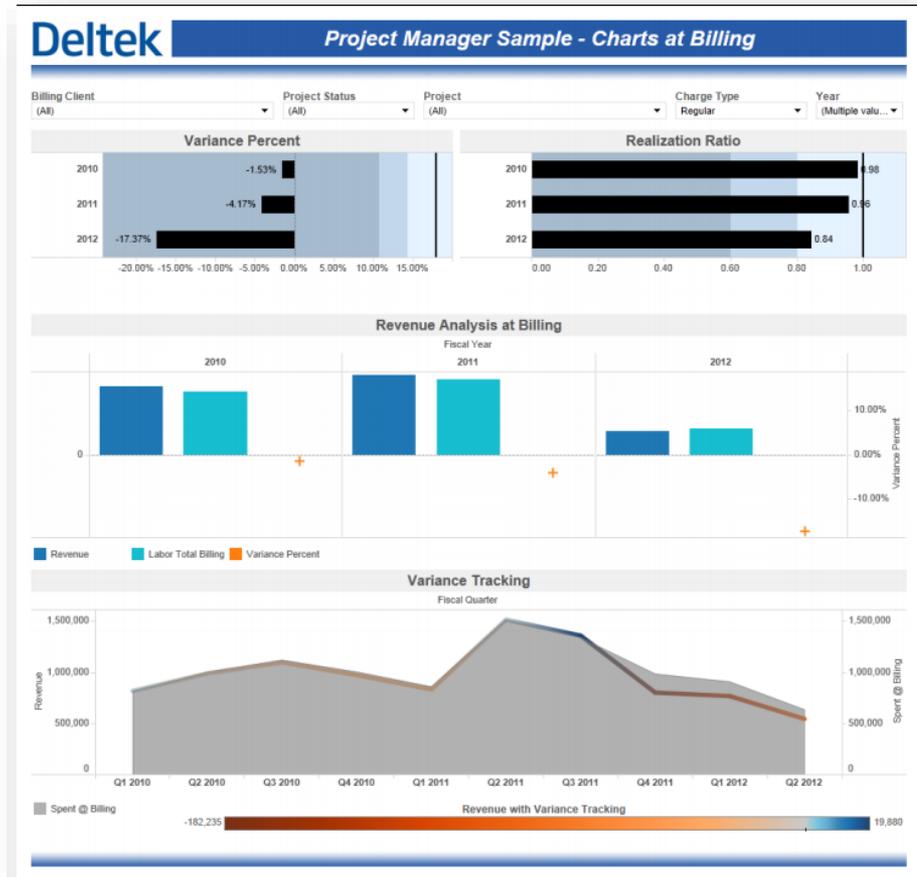
Project Manag.	2014				2015									
	Q1 2014	Q2 2014	Q3 2014	Q4 2014	Q1 2015	Q2 2015	Q3 2015	Q4 2015						
Received	\$4,207	\$255,351	\$215,272	\$281,270.67	\$269,921	\$2385.11	\$794,750	\$31481.55	\$148,901	\$209,64.95	\$126,364	\$255,787.2		
Billed	\$788	\$2176.25	\$8,271	\$28,988.8	\$18,918	\$2088.85	\$13,622	\$4750.15	\$61,598	\$9122.05	\$48,869	\$47619.49	\$33,485	\$25,623.1
Total	\$5,000	\$257,527.25	\$223,543	\$310,259.47	\$288,839	\$2,387.22	\$808,372	\$31,870.3	\$190,810	\$211,766.00	\$151,850	\$281,412.69	\$289,272.3	\$281,412.69



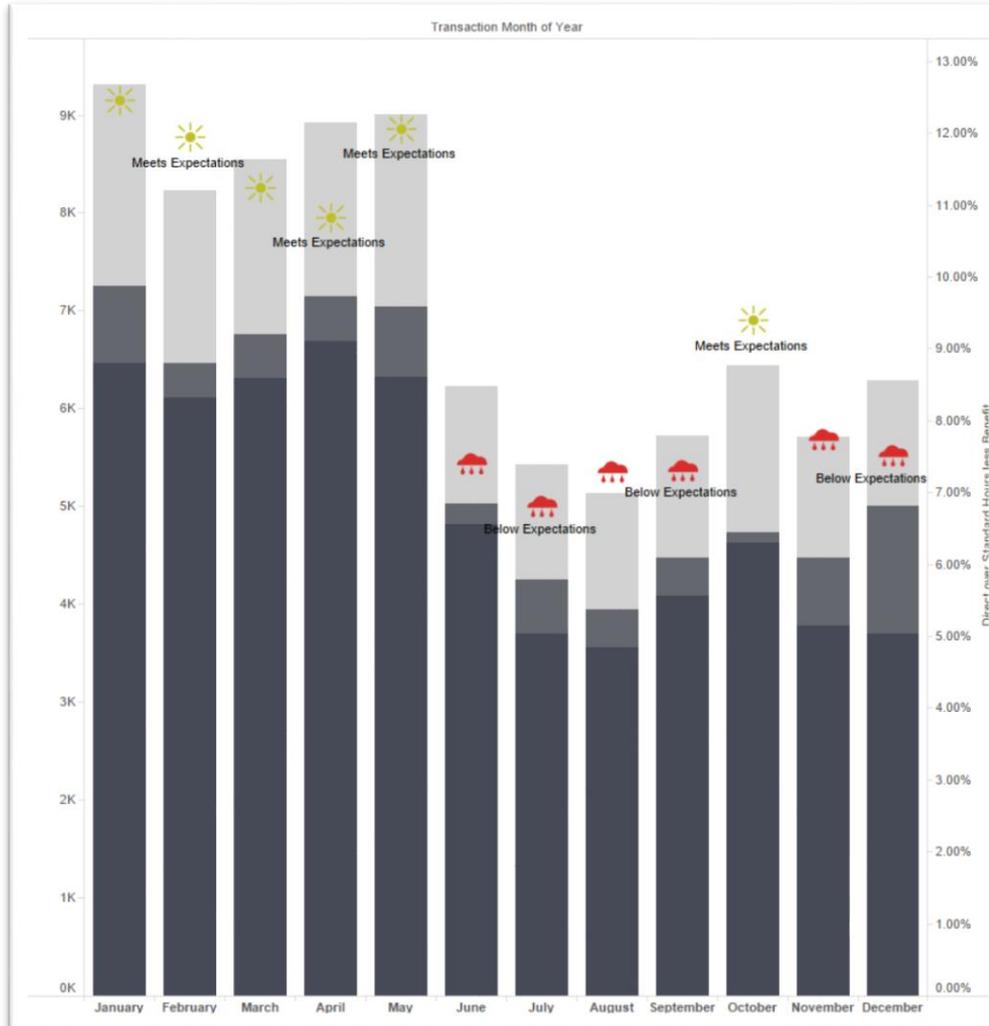
What Are Analysis Cubes and VPM

VPM takes the data stored in the tables and makes it available on interactive dashparts within Vision. This example is a Deltek Standard Dashpart that is geared to a project manager looking at the financial performance of their ongoing projects.

The fields at the top allow the manager to drill down on the Client, Project Status, Project and/or year

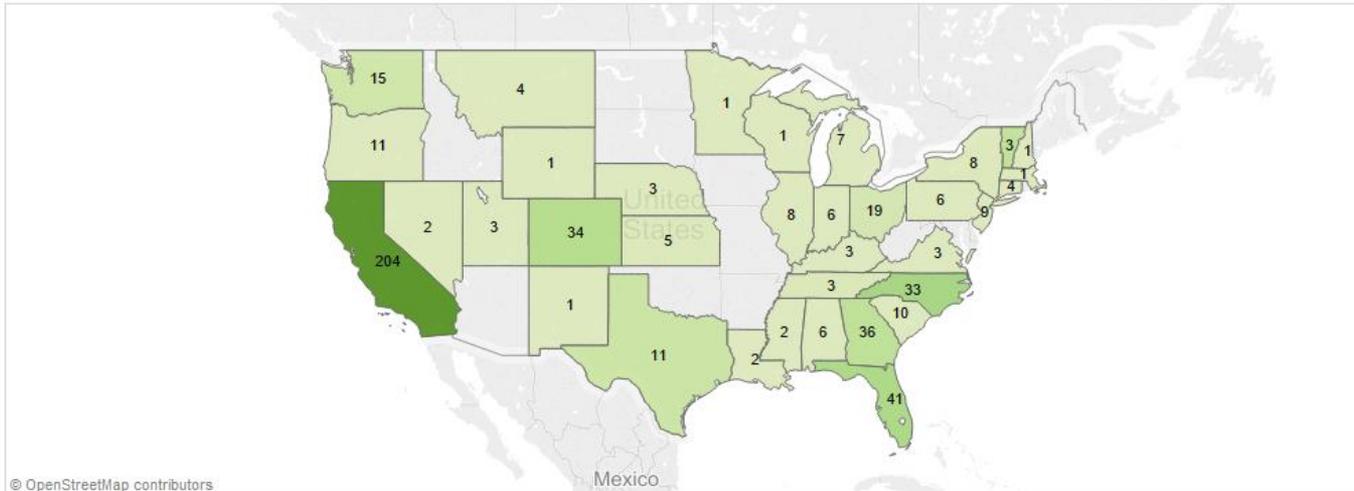


Make the Slide “Attention Grabbing”



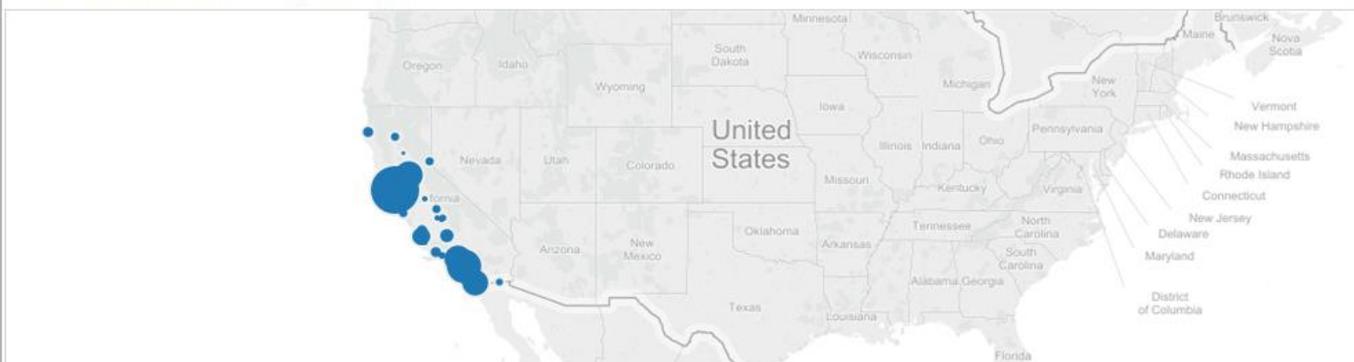
Focus On Your Strengths

By State (minimum 5K) darker colors indicate greater Revenue



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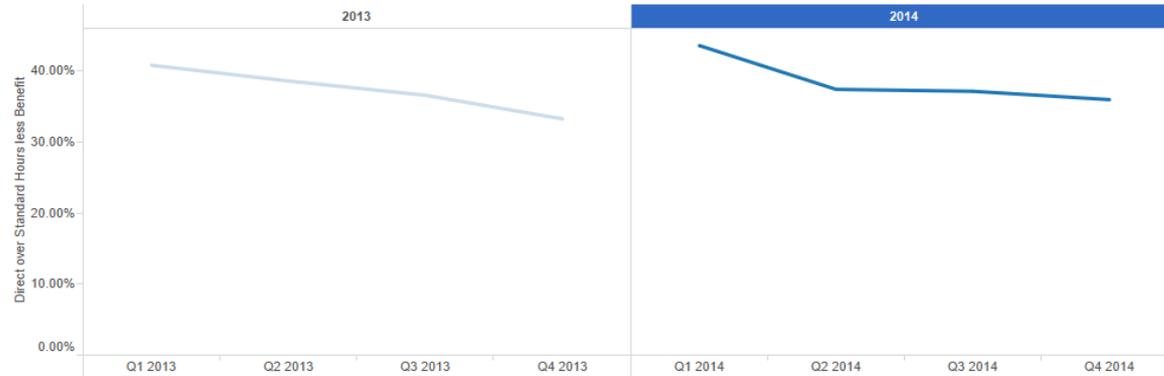
Select State above to see city breakout



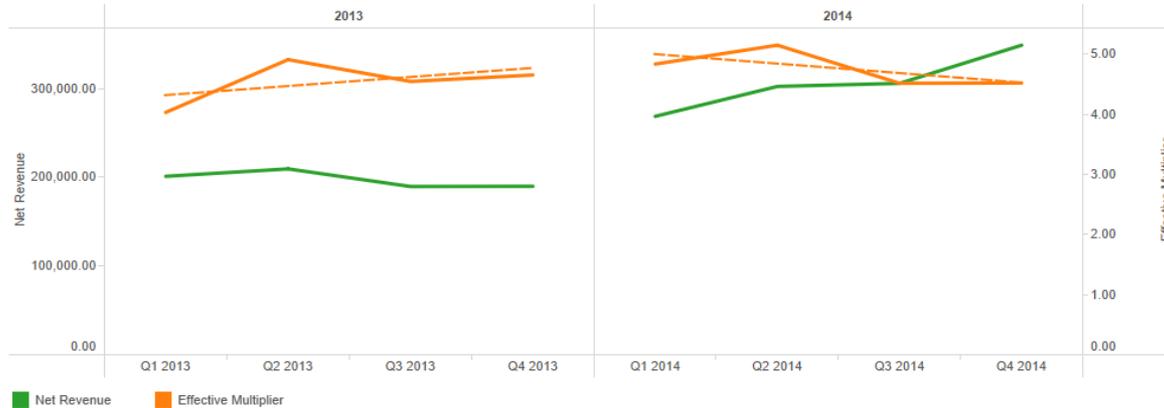
Identify Your Weakness

How are my staff and projects doing?

Staff Utilization over time



Revenue and multiplier



Net Revenue Effective Multiplier



QUESTIONS?



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Thank you for attending!

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