Deltek CRM Workshop Agenda

Hosted by Lindsay Diven, CPSM, Senior Consultant

8:00-8:30 **Check-in and Introductions, Coffee**

SESSION 1: CONNECTING WITH CLIENTS: CRM BASICS

8:30-8:45 **CRM Strategy Introduction**
8:45-10:45 **Review Deltek CRM Areas**
- Clients and Contacts
- Opportunities

10:45-11:00 BREAK
11:00-11:45 **Review Deltek CRM Areas (continued)**
- Employees related to CRM
- Projects related to CRM
- Activities and Calendar

11:45-12:15 **Navigating the System – Advanced Searching & saved searches**
12:15-12:45 LUNCH
12:45-1:15 **Configuring Deltek for Your Firm**
- Security Roles
- Screen Designer
- Code Tables
- User Defined Components

SESSION 2: LOOKING AT METRICS: MARKETING, SALES, AND OTHER KPIS

1:15-2:45 **Developing CRM Reporting**
- Sales Forecast Report
- Pipeline Report
- Client Touchpoints Report

2:45-3:00 BREAK
3:00-3:30 **Developing CRM Reporting (continued)**
- Hit Rate Report

3:30-4:00 **Setting up Useful Dashboards**
4:00-4:15 **Introducing Automation with Workflows**
4:15-4:30 **Going Mobile**
- iAccess
- CRM Touch app

4:30-5:00 **Wrap Up and Q&A**

At the end of this session, participants will be able to identify the key CRM metrics for their firm and can set up the tools to report on those metrics.

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BONUS #1: WORKSHOP WORKBOOK

All participants will receive a workbook to not only implement what they learned at the workshop but enhance their use of Deltek CRM. This workbook includes the following valuable information.

- **Discussion Starters –** This is a series of questions to get your firm thinking about CRM and how to leverage Deltek for those efforts. These questions may also help prioritize the work effort for this initiative.
- **Readiness Checklists** – A series of checklists for each CRM info center to get your CRM initiative ready to go.
- **Best Practices** – This section includes ideas and best practices for reports, workflows, dashboards, etc. You can use these ideas to brainstorm with your team to enhance your Deltek CRM.
- **Top 10 CRM Tips & Tricks** – Following David Letterman's famous Top Ten, we count down the top 10 tips and tricks for Deltek CRM developed by our CRM expert consultants.
- **Preparing for the Future: Vantagepoint** – Information and checklists on how to prepare your current Deltek CRM for the move to Vantagepoint.

BONUS #2: ONE-ON-ONE VIRTUAL CRM REVIEW

Participants who register during the **early bird registration phase** will receive the opportunity to meet one-on-one for one hour with the workshop facilitator. In this virtual review, the CRM Consultant will answer any of your specific Deltek CRM questions.
The virtual session will be scheduled within the two weeks following the CRM Workshop.

ASSUMPTIONS & REQUIREMENTS

Full Sail Partners makes the following assumptions about the participating firms:

- Deltek CRM is licensed and is the CRM software chosen by your firm.
- Participants have the basic understanding of your firm's business development, marketing, and proposals processes including where the appropriate information is coming from.
- For best results, firm attendees would include someone who is leading the CRM strategy and someone who is responsible for implementing the strategy.