



# 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

_							
Upcoming I	Milestones						
Active * 7/1/2019 S items more	7/3/2029 9 items store	7/11/2019 4 items more	7/51/2029 2 items morr	5/15/2029 Estimated Com	8/1/2009 Actual Complet		Actual Start
My In Purse	ult Projects		My Activities + New Activity				
		θT	AI Y				Show Complet
	PROJECT NAME *	ESTIMATED FEE	DATE	SUBJECT	CONTACT (PROJECT)	NOTES	COMPLETED
	9th Street Clinic	14,686,000.00 USI	Recurring Meeting	Weekly Business Development Heeting	Betty Fowler Bensin Research Lab.71	EQ.	
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	-		
<u> </u>		· · · ·	Proposal		George DeRosa, AlA	ß	
Pipeline ( Vetal Acceptance Shorting		Next Hear (Projected) * 3	USD-US Dollar +				🕱 Estratut For 🗶 Weighted For
Qualifie	d	-					2

### Deltek Know more. Do more.

### **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

Deltek Vantage	epoint >			Apple & Bartlett, PC (Nav F
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
Project		Long Name		Square Footage
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		
	Probability:	Project Currency ①	Billing Currency ③	Project Information
	80% - Shortlisted and Pending Interview	USD - US Dollar	USD - US Dollar	None

iPad 🔶		2:00 AM			-
≡ Deltek Vanta	agepoint >	Apple & Bartlett, PC	(Nav PSM) ▼	Period Endine	<b></b>
Firms Active Clients *	Find firm	▼ ◀ 12 of 50+ ►			
Anderson & Associat				۲	
	OVERVIEW ACTIVITIES ASSOCI	TIONS INSURANCE CONTACTS		_	
				=	Activities [
	View Associations for This firm only     Define the firm and all live	wer levels of the hierarchy		All	Events Task
	Activities		- 1	Wednesday	January 16, 2
	DATE SUBJECT	ATTENDEES	ASSOC	10:00 AM Weekly Busines	s Development
Firm Type: Client	Recurring Weekly Business Der Meeting ✓	elopment × steve Anderson,	Ander	Meeting	
Market: Commercial	Phone Call Anderson & Associates, LLC			01:30 PM	
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**

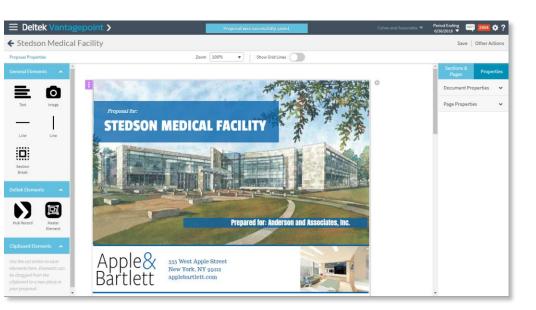
- Never miss another follow-up with alerts and notifications
- Easily identify which clients need attention with reporting
- Manage activities, clients and pursuits on mobile devices
- Proactively manage client relationships with the Outlook Add-In and an interactive calendar

#### Deltek Know more. Do more.\*

#### **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

coming Milestones				
a v 2022/2018 11/01/2018 Research Phas Estimat	ed Start			12/11/2018 Estimated Com
suits by Stage			Top Pursuits	
		0 T		
36	ESTIMATED FEE ENGAGEMENT N	AME	ENGAGEMENT NAME	ENGAGEMENT NUMBER
Totals	5,725,000.00		TOTALS	
Awaiting Signature	175,000.00		Warriors Re-Org	200A
Internal Proposal Review	125,000.00		Attract higher caliber students	2002
Negotiation	565,000.00		GVL Park	00000.03
Pre-Qualified	410,000.00		News Inc. Org. Analysis	200T
Proposal Presented/Submitted	367,000.00		GVL Bridge	00000.02
Qualified	260,000.00		Modernize DAM system	2001
Solution/Proposal Creation	\$30,000.00		Website Analysis	2003
Won	3,293,000.00		Risk Assessment- New Market	2004
			Michelle's Test Opportunity	2003
eline ① BySlags ¥ LastYour ¥				
Non				
800				
Non of Presented Schwitted				



#### **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

© Deltek, Inc. • All Rights Reserved • All referenced trademarks are the property of their respective owners. Pricing subject to change without notice.

# Deltek Know more. Do more.\*

#### **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

Di Ci Ei Se Aj Re

H An Bricia Er Cl M Print Sa Pi Cl

7/3/2019 9 items						
more	7/11/2018 4 items more	7/31/2019 2 items more	8/18/2019 Estimated Com	9/1/2019 Actual Complet		10/2/2019 Actual Start
Projects		My Activities + New Activity				
	6 τ	All ¥				Show Complet
OJECT NAME *	ESTIMATED FEE	DATE	SUBJECT	CONTACT (PROJECT)	NOTES	COMPLETED
n Street Clinic	14,606,000.00 USI	Recurring Meeting	Weekly Business Development Meeting	Betty Fowler Benzon Research Lab.01	Ľ <b>⊗</b>	<u> </u>
IC Plaza Study	250,000.00 USD	Recurring Meeting	Client Lunch	Charlie Stuart Adelphi Research Lab	ß	
lelphi Research Lab	600,000.00 USD	Recurring	Internal Staff Meeting	Adelaida Biount	126	<b></b>
nerican River Restoration	2,300,000.00 USD	Recurring	Client Lunch	Kayla Dacey	E6	<b></b>
pe Cod Vacation Club	900,000.00 USD	201 000	Proposal Due			8
		Proposal	FIUptone over	Seconge Generality per-	10	
	Street Clinic Street Clinic Plaza Study Iphi Research Lab erican River Restoration	COV     C	Al     Al	Al      Al	Ort         SUBJECT         CONTACT (PROJECT)           JEST NAME *         ESTIMATED FEE         DATE         SUBJECT         CONTACT (PROJECT)           Street Clinic         1.100,000,000 DB         Recurring         Weekly Business Development Meeting         Bethy Fowler           Place Study         250,000,000 DB         Recurring         Client Lanch         Image: Client Clinic           Iphil Research Lab         600,000,00 DB         Recurring         Internal Staff Meeting         Advalada Biount           erican River Restoration         2,360,000,00 DB         Recurring         Client Lanch         Elow Kayla Daccy           execuring         Client Lunch         Elow Kayla Daccy         Recurring         Client Lunch         Kayla Daccy           execuring         Client Lunch         Elow Kayla Daccy         Recurring         Client Lunch         Client Lunch         Kayla Daccy	Alt +       DECT MARE +     ESTIMATED FEE LASOG GOODOUTS Street Clinic     SUBJECT     CONTACT (PRUJECT)     NOTES       Recurring Plana Staff Meeting     Weekly Business Development Meeting Plana Staff Meeting     Entry Towler Plana Staff Meeting     Entry Towler Plana Staff Meeting     If alter Staff Plana Staff Meeting     If alter Staff       Plana Staff Meeting     Client Lunch     If alter Staff     If alter Staff       Recurring erican River Restoration     2,300,000.00005     Internal Staff Meeting     Addalida Blount     If alter Meeting       Recurring erican River Restoration     2,300,000.005     For alter Lunch     If Alter Meeting     If alter Meeting       Recurring erican River Restoration Club     900,000.005     For alter Meeting     Proposal Due     George Defilosa, MA

Itek Vantagepo									Cohen and Associates 🔻	Period Ending 02-28-2019 🔻	HEY 94 🔅
lication	Activity All * Fin					*	I0 of 0 ▶				
FF											
rds 🔉	call Brett Miller										
et								Welcome	to the Deltek Personal Assistant.	Ask me something	4
r	OVERVIEW • FILES & LINK	S									
Report	WHEN										
ice	START DATE			END DATE			REMINDER	Creating:	a Contact with the name Brett Mil	er.	
l Center	11-16-2018 12:00 PM	15	То	11-16-20	18 12:30 PM	15	15 Minutes		Remi	nd me to call Brett	Miller on Friday
g											
	All Day Event		Priv	ate				Creating:	a phone call activity for you		
s											ci
tes	REPEATS						SHOW TIME A	Enter a comm	nand and press enter!		ļ
	None	•					Busy	•			
25											
>											
ng Campaigns	LOCATION				TYPE *						
>					Phone Call			•			
5	Stakeholders										
23											
	ATTENDEES William Berry, PE (Owner)				CLIENTS There are no reco				PRIORITY		•
2	+ Add Attendee				+ Add Client				meanann		
CEMANAGEMENT					- Page clicit						
View	Associations										
iew	PF TEST				MARKETING CAMPA	GN			PROJECT		
E CONTRACTOR OF	There are no records to sho	w in this	grid.					*			•

#### 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

#### Deltek, Inc. 2291 Wood Oak Drive, Herndon VA 20171

© Deltek, Inc. • All Rights Reserved • All referenced trademarks are the property of their respective owners. Pricing subject to change without notice.

#### Deltek Know more. Do more.

#### 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