Deltek Vision® CRM

Customer Relationship Management for Your Project-Focused Business

"Vision has brought our marketing, accounting and project management departments together. For the first time, these departments are regularly meeting to track and follow up leads, assign values to each lead and track hit rates on these leads through multiple stages. Not only is this helping us understand what's coming down the pipeline so we can streamline our resources accordingly, but it is also helping our firm get a clear understanding of how our marketing efforts are being received."

» Durrant
  Performance Innovation

Rethink the way your organization shares information

Deltek Vision Customer Relationship Management (CRM) is designed specifically for project-focused businesses. The centralized, web-based system makes it possible for everyone in your organization—from sales and marketing to accounting and finance to management and administration—to work together to meet your clients' needs. This gives your firm a tangible, sizeable advantage over your competition by putting your clients at the center of your business world. By automating client management, you also gain a competitive edge, win more business and increase customer satisfaction.

Deltek Vision CRM includes:

- **Client and Contact Management—**track key information throughout the enterprise
- **Opportunity Management—**track leads and manage your pipeline
- **Marketing Automation—**develop and track targeted campaigns from one system
- **Schedule and Activity Management—** automatically track and synchronize your interactions with clients

Why choose Deltek Vision CRM?

Your firm's success depends on putting valuable corporate knowledge in the hands of the people who need it most—increasing productivity and sales. Deltek Vision CRM provides key personnel the tools they need to make strategic decisions that impact your firm's future. By making client and prospect information accessible and manageable across your entire organization, you will reach a higher quality of account coordination. And, because Deltek Vision CRM is web-based, you can see all the interactions related to a client or a prospect, anytime and from anywhere.

Features and Benefits:

- Increase Revenue From Existing Clients
- Improve Productivity and Proposal Accuracy
- Increase Win Rates
- Quickly Support Unique Business Processes

With Deltek Vision CRM marketing functionality, you can create effective marketing campaigns targeted to key prospects, clients and opportunities

Key Features and Benefits

Controlling and Coordinating all Facets of Client Management

Client and Contact Management — Deltek Vision CRM organizes all of your client information—including day-to-day interactions—in one centralized database. This instant access to client and contact information lets you leverage and nurture professional relationships to win more business. Marketing staff, sales personnel, project managers, executives and administrative personnel can share all types of client information, including:

- Future and past activities that relate to clients and contacts, including meetings, phone calls, tasks and emails

- Future opportunities and past projects relating to your clients

- Relationships that your employees have with clients and contacts

- Relationships among your clients and contacts

- External files, such as contracts and correspondence, that relate to your clients and contacts

Opportunity Management — Deltek Vision CRM opportunity and pipeline tracking capabilities allow sales and business development professionals to manage all aspects of the opportunity process, including:

- Lead/opportunity tracking

- Fee and backlog forecasting

- Proposal tracking

- Opportunity team management

- Scope and fee proposal development
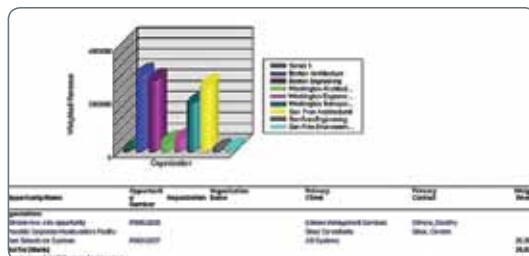
- Opportunity-related files

Figure 1: Vision gives you unprecedented insight into your opportunity pipeline

Deltek's flexible reporting capabilities include a catalog of opportunity reports that marketers and managers can use for lead tracking and meaningful analysis of anticipated fees, trends, success rates and more.

Marketing Automation — With Deltek Vision CRM marketing functionality, you can create effective marketing campaigns targeted to key prospects, clients and opportunities. From mailing campaigns to email blasts, Deltek Vision CRM provides the tools you need to tailor your message and your mailing list, through user-defined lists and queries that can be saved for future campaigns. Deltek's sophisticated mail-merge functionality allows you to create correspondence customized for each recipient. Deltek Vision CRM also logs all activity for each campaign, providing a historical record of all materials, emails and correspondence sent to a specific contact.

Figure 2: With Vision, you have the tools to develop and monitor effective marketing campaign to earn new clients and help retain existing clients

Schedule and Activity Management — Deltek Vision CRM offers powerful and intuitive activity management and calendar functionality. Professionals from across your organization can schedule activities and view calendar events in daily, weekly and monthly formats.

Individuals can schedule activities through Deltek's calendar views or through Microsoft Outlook. Vision Connect, a solution that integrates Deltek Vision with Outlook enables individuals to be able to perform important Vision tasks directly in Outlook. Manage appointments, emails, and contacts as well as manage your clients, activities and opportunities, all from Outlook.

Surpassing Today's Technology Standards

Powerful and Flexible Reporting—Deltek Vision CRM includes a powerful easy to use interactive reporting environment that meets the most demanding reporting requirements. You will enjoy an intuitive interface that allows pinpoint control of the content and layout of reports, including column selection, sorting and grouping, formatting, charting and graphing and more.

Universal Access and Zero Client Install— Any user can enjoy global access to Deltek Vision CRM applications. Other than a web browser, you need no software—no Activex® controls plug-ins, applets or proprietary controls.

> Deltek Vision CRM supports hundreds of concurrent users, yet can be readily scaled down to meet the requirements and resources of a small organization

Scalable Server-Based Architecture— Deltek Vision CRM supports hundreds of concurrent users, yet can be readily scaled down to meet the requirements and resources of a small organization. Vision CRM can run entirely on one server or can scale to multiple servers as your concurrent usage increases.

Figure 4: Deltek Vision CRM project information center team tab.

It all adds up to a solution that helps you win more business. By providing a complete, centralized and cost-effective project-based solution for managing your business development and marketing information and activities, Deltek Vision CRM helps you make more effective business development decisions while increasing client satisfaction and revenue.
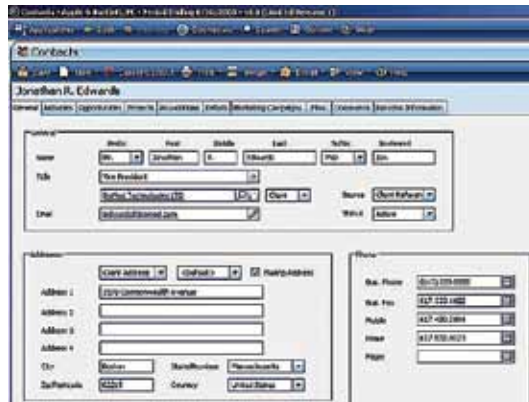

Figure 3: Deltek Vision CRM contact information center.

Deltek Know more.
Do more.™

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