

# Client Innovation:

## Doing More with Your Deltek Vision CRM

*Presented by:*



# Agenda

## Agenda

1. Resources
2. WebEx Instructions
3. Presentation: CRM Client Innovation
4. Questions

Keep your business  
on *course*.

Full Sail Partners



# ***Resources from Full Sail Partners:***

## **Whitepapers & Publications**

- **Client Feedback – Don't Wait 'Till It's Too Late!**  
<http://bit.ly/1sElgYg>
- **Why Are CRMs So Important?**  
<http://bit.ly/1CW6L9n>

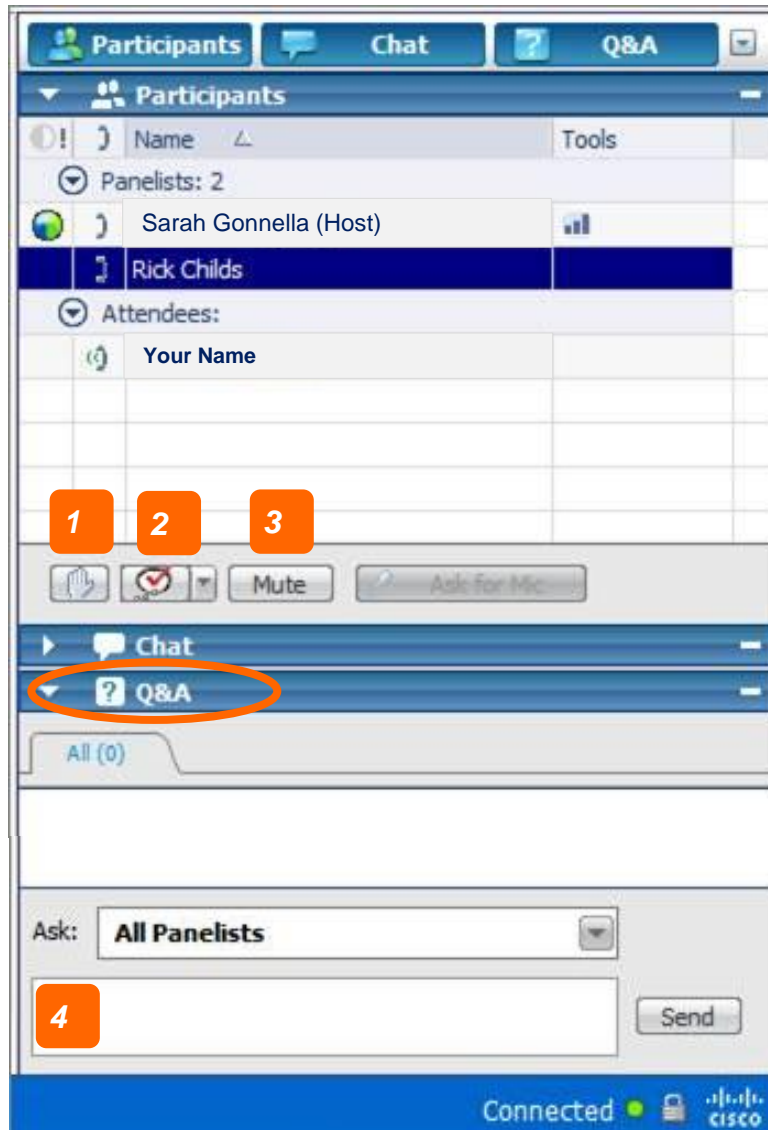
## **Events, Webinars and Resources**

- **Full Sail Partners Online Events:**  
<http://bit.ly/URI1K0>
- **Managing a CRM System and Beyond:**  
<http://bit.ly/1p1EhVB>
- **Growing Smarter | Core Growth Strategies & Metrics for PS Firms:**  
<http://bit.ly/16JePLy>

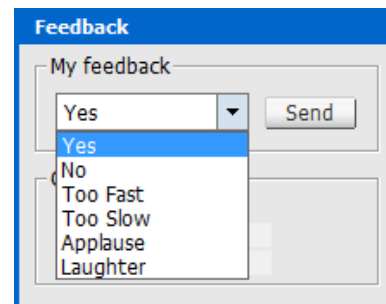
***Join The Full Sail Partners' User Group Space on Kona:  
Search for 'Full Sail Partners User Group' on Kona***



# WebEx Instructions



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)



# Pursuit & Workload Tracking

## With User Defined Info Centers



# Company Overview

- Established 1964
- Privately-held, employee owned
- 2,600 employees in 8 offices
- Over 175 active jobs
- Average job size is \$12 million
- Projects range from \$1,000 to \$350 million
- Currently working in 20 states
- 2014 National ABC Contractor of the Year!

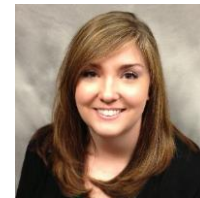
**BRASFIELD  
& GORRIE**  
GENERAL CONTRACTORS



NO. 1 | ENGINEERING NEWS-RECORD SOUTHEAST

**NO.1 IN**

Top Contractors  
Private Contractors  
General Building  
Health Care  
Green  
New Construction  
Georgia Contractors  
Negotiated  
Hard-Bid



**Rebekah  
Casey**  
Corporate  
Marketing  
Information  
Manager



# The Challenge

## Too many spreadsheets & forms

- Marketing pursuit workload
- Pursuit materials
- Graphics workload
- Graphics requests
- Events

Divisions	Project Name	Pursuit Number	Project Type	Estimating Number	Divisions G/L Codes	Due Date	Project
ORL Commer	Clearwater Aquarium	13043.13000106	PREQ		ORL Commercial - 350221435.6950	7/8/2013	Long
ORL Commercial	Orlando International Airport - Hensel Phelps	13043.14000108	RFQ		ORL Commercial - 350221435.6950	8/22/2014	Long
ORL Commercial	Universal Studios	13043.14000110	PREQ		ORL Commercial - 350221435.6950	8/27/2014	Light
ORL Commercial	Franklin Street Residential	13043.14000112	RFP		ORL Commercial - 350221435.6950	9/26/2014	Long
ORL Commercial	Liberty Warehouse	13043.14000116	Bid	16401	ORL Commercial - 350221435.6950	10/31/2014	Long
ORL Commercial	Westwood Memory Facility	13043.14000117	RFQ	16402	ORL Commercial - 350221435.6950	10/31/2014	Long
ORL Commercial	Seminole State College - Wellness Center	13043.14000115	RFQ		ORL Commercial - 350221435.6950	11/4/2014	Long
ORL Commercial	St. Margaret Mary Church Expansion	13043.14000118	RFP		ORL Commercial - 350221435.6950	11/14/2014	Light
ORL Commercial	Seminole State College						Light
ORL Commercial	St Margaret Mary Catholic Presentation	Pilot Wallet Card for Aviation	5/1/2014	Department Related	Young, John	Pennington, Skip	Pilot Wallet Card for Aviation (10)
ORL Commercial	St. Margaret Mary Church	Reynolds Plantation, National Village	4/17/2014	Division related	Terrell, Adam	Zyryanov, Filipp	GMP Pricing, 100% DD graphics This isnt pursuit, its a pricing book. Charging to ATL Mixed Use
ORL Commercial	St. Luke's Lutheran Church	State Farm Atlanta HUB	4/16/2014	Pursuit related	Hiett, Janis	Zyryanov, Filipp	Worksession materials graphics
		Braves Cobb Co. Stadium	5/8/2014	Pursuit related		Zyryanov, Filipp	Proposal Graphics
		Health & Wellness Newsletter	4/17/2014	Department Related	Martz, Jenny	Moore, Stacie	Review and clean up content in publisher to be emailed out to company
		Nashville Ad - Ensworth Football Program	5/12/2014	Division related	Hamilton, Natalie	Moore, Stacie	Create Ad
		Nashville Ad - Music					Create Ad

## Difficulty Reconciling at month end

- Timesheets
- Pursuit cost close-out
- Materials charges

BRASFIELD & GORRIE Marketing Material Charges										
Date	Coordinator	Items/Supplies	Unit Cost	Qty	Total	Region / Department	Pursuit Name or Person/Department Using Materials	Pursuit Number	Charge to Estimate/Cost Code or G/L Code	Credit Account (For Will Only)
1/11/2013	Rebekah Light	Tab/covers/back	\$0.50	49	\$24.50	Region 3	FHO North Surgery Elevator Addition		13722.5501.00000045	
1/11/2013	Rebekah Light	11x17 100 lb cover stock	\$0.75	14	\$10.50	Region 3	FHO North Surgery Elevator Addition		13722.5501.00000045	
1/11/2013	Rebekah Light	Twin loop binding (all sizes)	\$1.00	7	\$7.00	Region 3	FHO North Surgery Elevator Addition		13722.5501.00000045	
1/17/2013	Jennifer Foushee	Tab/covers/back	\$0.50	50	\$25.00	Region 4	Ensworth Natatorium - Suzanne Rosiles/Dan Armour		13746.1321.01594001	
1/17/2013	Katie Long	Tab/covers/back	\$0.50	16	\$8.00	Region 3	FLH Winter Park South Wing		14067.5501.00000045	
1/17/2013	Katie Long	11x17 100 lb cover stock	\$0.75	24	\$18.00	Region 3	FLH Winter Park South Wing		14067.5501.00000045	
1/28/2013	Stacie Moore	Tab/covers/back	\$0.50	3	\$1.50	Region 4	Ft. Stewart Training Range		13035.5403.13000100	
1/28/2013	Stacie Moore	CDs/DVDs with labels	\$1.00	3	\$3.00	Region 4	Ft. Stewart Training Range		13035.5403.13000100	
1/28/2013	Stacie Moore	1/2" and 1" binders	\$3.00	3	\$9.00	Region 4	Ft. Stewart Training Range		13035.5403.13000100	
1/28/2013	Stacie Moore	CD clam shell cases	\$1.00	3	\$3.00	Region 4	Ft. Stewart Training Range		13035.5403.13000100	



# Objectives

- Simplify workload tracking for the marketing coordinators
- Get graphic designers to actually track their projects
- Standardize graphics requests
- Simplify month end reconciling





# Solution

- User Defined Infocenter
- Each pursuit added as a new record
- Phases are tracked within the record

Deltek Vision - Marketing Pursuits - Brasfield & Gorrie, LLC - v7.2

Show Navigation Back Forward Dashboard Navigator Kona Search Options Help

Marketing Pursuits Search

Save New Delete Marketing Pursuits Print List View Help

### Test Parking Deck

General Shortlist/Win Materials Activities Files Graphics

Project Name: Test Parking Deck

Due Date: 1/20/2015 Pursuit Type: Proposal Graphics Needed: Yes

Contract Amount: 15,000,000.00 City: Harrisonburg State: VA

Proposal Phase

Proposal Phase-Number	Proposal Phase-Proposal Type	Proposal Phase-Owner	Proposal Phase-Due Date
Phase 3	Interview/Presentation	Casey, Rebekah	1/30/2015
Phase 1	RFQ	Casey, Rebekah	8/13/2014
Phase 2	RFP	Casey, Rebekah	9/24/2014

Services: GC Joint Venture Market Sector: Healthcare

Marketing Owner: Casey, Rebekah BD Owner: Duckworth, Scott

Pursuit Billing Info

Pursuit Number: 13060.14000106 Close To: Division GL Status: Close

Division/Department: Birmingham Federal GL Code: 340309435.5401

Region/Department: Region 4 Other Number:

Marketing Group: Pursuit-Mkt Group3

Marketing Cost Types

- 5403 - Labor
- 5406 - Materials
- 5408 - Client Meals & Entertainment
- 5409 - Employee Meals & Entertainment
- 5411 - Travel
- 5413 - Shipping/Postage

Admin Use

Marketing Job Number: 13035 Material Credit Account: 999100435.7453.104

Marketing Cost Code: 14000106 Marketing Material Charge Account: 13035.5406.14000106

Marketing Labor Cost Type: 5403 Marketing Labor Charge Account: 13035.5403.14000106

Marketing Materials Cost Type: 5406

☒ E1 N/A ☐ Closed in E1

Ready



# Materials

- Enter materials used for the pursuit
- User Initiated Workflows total the materials cost for the pursuit

**Test Parking Deck**

General Shortlist/Win **Materials** Activities Files Graphics

**Covers/Tabs**

<input type="text" value="30"/>	B&G Tabs/Covers/Bads QTY
<input type="text" value="15"/>	Clear Covers QTY
<input type="text"/>	Custom tabs (per set of 5) QTY

Materials Grand Total

**Binding**

<input type="text" value="8"/>	Twin loop binding (all sizes) QTY
<input type="text" value="10"/>	1/2" and 1" binders QTY
<input type="text" value="6"/>	1 1/2" binders QTY
<input type="text" value="9"/>	2" binders QTY

**CD/Jump Drives**

<input type="text" value="15"/>	CDs/DVDs with Labels QTY
<input type="text"/>	CD Clam Shell Cases QTY
<input type="text"/>	Jump drives (on company store) QTY



# Graphics

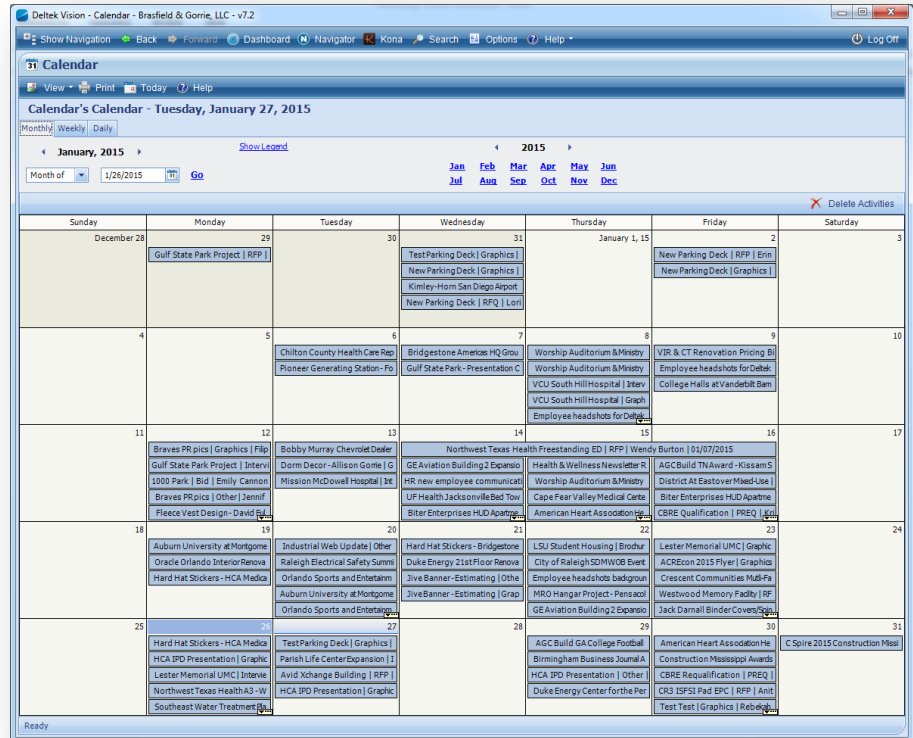
- Graphics requests for pursuits included as a tab on the pursuit record
- Marketing Coordinators fill out the graphics request based on needs for the pursuit
- Graphic designers get email alerts for new and changed requests

General   Shortlist/Win   Materials   Activities   Files   Graphics											
Graphics Request											
Graphics-Assigned to	Type of Graphic	Requested by	Draft Due	Final Due	Graphics-File Path	Quantity	Special Logo	Orientation	Graphics-Notes	Graphics-Create Date	
<a href="#">Zvyranov, Filipp</a>	Covers	<a href="#">Breeland, Kelly</a>		1/8/2015	R:\MarketingLibrary\Atlanta	7	<input type="checkbox"/>	Vertical	<a href="#">Spiral-bound Cover text</a>		
<a href="#">Zvyranov, Filipp</a>	Presentation	<a href="#">Breeland, Kelly</a>		1/14/2015	R:\MarketingLibrary\Atlanta	1	<input type="checkbox"/>	Horizontal	<a href="#">We would like a map of our Athens projects hig</a>	1/13/2015	



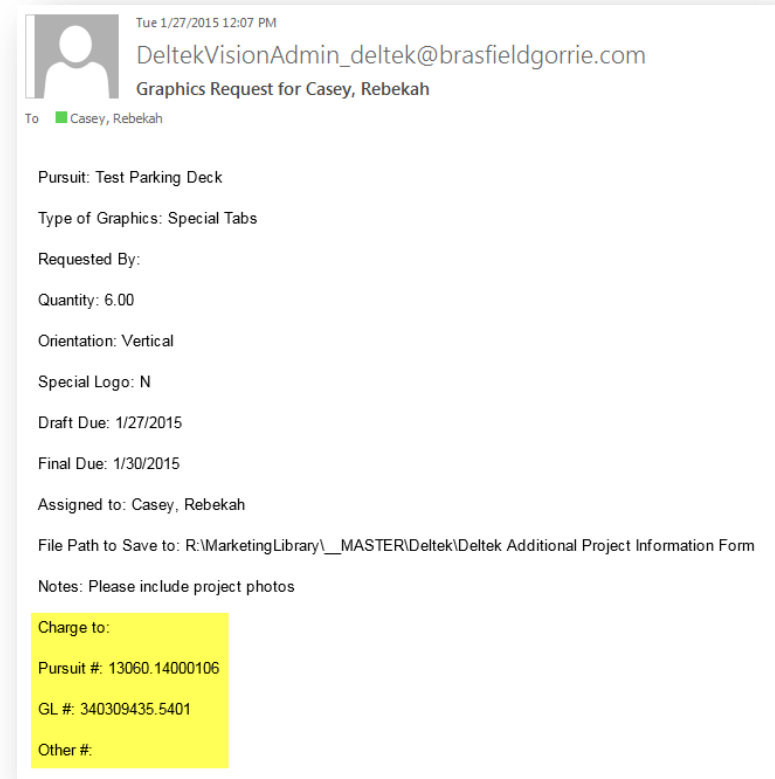
# Workload Calendar

- Set up shared calendar
- Stored procedure workflows run to create activity records for the pursuit owner and assigned graphics resource
  - Pursuit/graphics owner's calendar
  - Team workload calendar
  - Activities update when pursuit/graphics info changes



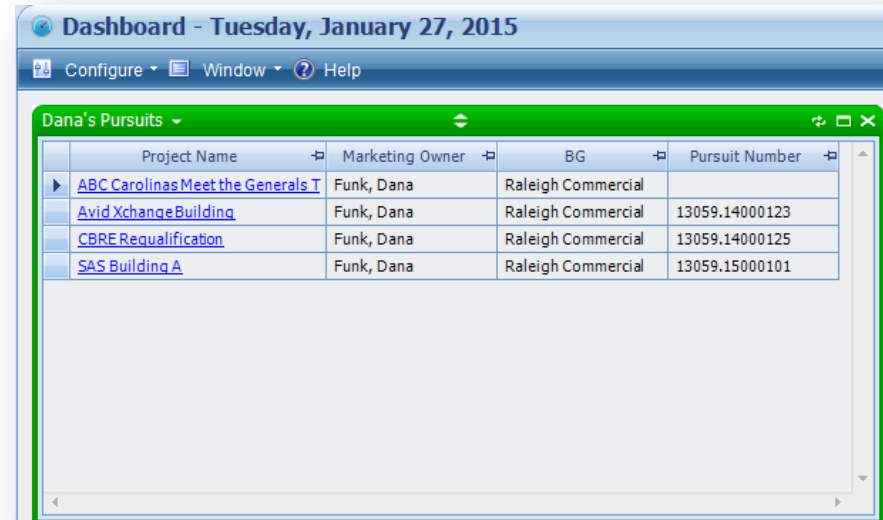
# Workflow Email Alerts

- **Market Sector Leaders**
  - Pursuit added that is associated to their market sector
  - Keeps them in the know
- **Graphics Team**
  - New graphics requests
  - Changed graphics requests
  - Codes for their timesheets



# Dashboard

- **“My Open Pursuits”**
  - Each marketing coordinator has a dashpart to display their pursuits
  - Easy access to open pursuits
- **“My Team’s Open Pursuits”**
  - Each manager has a dashpart to display their team’s pursuits
  - Easy access to open pursuits



Project Name	Marketing Owner	BG	Pursuit Number
<a href="#">ABC Carolinas Meet the Generals T</a>	Funk, Dana	Raleigh Commercial	
<a href="#">Avid Xchange Building</a>	Funk, Dana	Raleigh Commercial	13059.14000123
<a href="#">CBRE Requalification</a>	Funk, Dana	Raleigh Commercial	13059.14000125
<a href="#">SAS Building A</a>	Funk, Dana	Raleigh Commercial	13059.15000101



# Reports

- Pursuit close-out
- Materials charges
- Upcoming events
- Workload by resource
- Weekly graphics pursuit list

## Weekly Graphics Pursuit List

Tuesday, February 10, 2015  
8:55:48 AM

Brasfield & Gorrie, LLC

Project Name	Division/Department	Marketing Labor Charge Account	Other Number	GL Code	Graphics-Type of Graphic	Graphics-Due Date - Draft	Graphics-Due Date - Final
Mousepads for new employees	HR/Recruiting			N/A	Other	2/2/2015	2/4/2015
Braves SunTrust Park OSHA Partnership Signing	Atlanta Sports & Entertainment			320371435.6950	Other	2/11/2015	2/18/2015
Atlanta Quarterly event/2020 rollout email insert	Marketing			N/A	Other	2/10/2015	2/10/2015
2015 Healthcare E-blast	Atlanta Hospital			320346435.6950	Other		1/16/2015
Tides 4 HH decal	Atlanta Commercial/Hospitality			32023435.6950	Other	1/28/2015	1/28/2015
HR new employee communications graphics	HR/Recruiting			N/A	Other	1/13/2015	1/14/2015
Hard Hat decals - OSHA 10 hr and 30 hr	Safety				Other	2/3/2015	2/6/2015
2015 Greenville Roast Featuring Bob Hughes	Atlanta Corporate Services East			320248435.6950	Other	2/11/2015	2/16/2015
Employee headshots for Deltek	Marketing			N/A	Other		1/9/2015
Raleigh Electrical Safety Summit Invitation	Raleigh Healthcare		999100495.7370	380321435.6950	Other	1/16/2015	1/20/2015
Braves PR pics	Corporate				Other	1/12/2015	1/12/2015
Moses Cone AHU case study piece	Marketing			N/A	Other	1/26/2015	1/30/2015
Employee headshots background correction					Other	1/22/2015	1/22/2015



# Benefits

- We accomplished our initial objectives
- One-stop shop for pursuit information (RFP, Submittals, Graphics, etc.)
- Pursuits on personal activity calendars and dashboards
- Managers have easy access to their team's workload via activity calendar, dashboard, and reports
- Email alerts and auto-distributed reports keep everyone in the know
- Everyone loves it!

*"Thank you so much for making this happen!"*

*"The emailed weekly graphics report is awesome and makes doing my timesheet so much easier. Thank you!"*

*"Thank you for the Deltek Pursuit Tracker! This is so awesome and will make all of our lives easier!"*

*"I'm loving the new process! Thanks so much!"*





# Questions?



# Goal vs. Actual Reporting

## With Custom Fields & Workflows



# The Challenge

## Inability or Difficulty of Reporting on Goals

- Labor intensive (manual or export)
- Not real-time
- Inaccuracies
- Non-existent



# Objectives

- Report monthly, quarterly or yearly on success of obtaining goals
- Ability to see if remaining pipeline exists to accomplish the goal
- Quick visual comparison for office and department leads
- Eliminate external manipulation in other documents
- Provide real-time reporting



# Solution

- Custom Fields
- Workflows to Automate the Process
- Modified standard reports
- Created web dashpart








The screenshot displays a web application titled 'Opportunities' with a search bar and a menu bar containing 'Save', 'New', 'Delete Opportunity', 'Print', 'Merge', 'Email', 'Photo', 'List View', and 'Help'. The main form is for 'Gilbert Elementary School' and includes the following sections:

- General Information:** Name (Gilbert Elementary School), Number (092002), Status (Inactive), City (Washington), State/Province (Washington, DC), Project Significance.
- Organization & Contacts:** Organization (Atlanta Engineering), Primary Company (City of Memphis), Primary Contact (Davis, Mary Sue), Principal-In-Charge (Apple, William), Project Manager (Anderson, Steve), Opportunity Owner.
- Financials & Details:** Revenue (2,600,000.00), Probability (100), Weighted Revenue (2,600,000.00), Type (Educational Facilities), Stage (4-Proposal Submitted), Source (FedBizOpps).
- Timeline & Dates:** Proposal Due Date (8/29/2009), Interview Date, Proj. Est. Start (10/13/2010), Proj. Est. Completion (8/1/2011), Date Opened (6/12/2008), Anticipated Win Date (8/29/2010), Analysis Level (03-Pipeline), Date Closed, Quarter (Q3), Month (08 - August), Year (2010), Days Open (2463).
- Additional Fields:** Add Service/Task Order? (No), Client Project #, Promo Project, Original Project, Reg. Project (0000020.03), Project Plan.
- Footer:** Closed Reason, Next Action Date, Closed Notes (with Edit button), Next Action Task (with Edit button).



# Customize Opportunities

- **Custom Fields**
  - Anticipated Win Date
  - Analysis Level
  - Year to Close
  - Quarter to Close
  - Month to Close
- **Stages**
  - Added new stage - Goals

Date Opened	<input type="text" value="6/12/2008"/>		Date Closed	<input type="text" value=""/>	
Anticipated WinDate	<input type="text" value="8/29/2010"/>		Quarter	<input type="text" value="Q3"/>	
Analysis Level	<input type="text" value="03-Pipeline"/>		Month	<input type="text" value="08 - August"/>	
			Year	<input type="text" value="2010"/>	
			Days Open	<input type="text" value="2463"/>	



# Workflows

- **SQL Expression to create:**

- Year to Close
- Quarter to Closer
- Month to Close

Uses Anticipated Win Date for active stages and uses Date Closed when inactive (Win or Lost)

- **Update Analysis Level based on Stage to use in report sorting**

**User Initiated Workflow**

Save Print Help

Application: Opportunities

Workflow Table	Workflow Type	Level	Active	Description
[Opportunity Record]	Change		<input checked="" type="checkbox"/>	Proposal Loss
[Opportunity Record]	Change		<input checked="" type="checkbox"/>	Opportunity Go/No-Go Calculations
[Opportunity Record]	Change		<input checked="" type="checkbox"/>	When Stage changes to Writing Proposal
[Opportunity Record]	Change		<input checked="" type="checkbox"/>	Opportunity Award to Project Initiation
[Opportunity Record]	Change		<input checked="" type="checkbox"/>	Proposal Win
[Opportunity Record]	Insert/Associate		<input checked="" type="checkbox"/>	Proposal Due Date Added Upon Creation
[Opportunity Record]	Change		<input checked="" type="checkbox"/>	Anticipated Win Date has changed

Action	Level	Active	Description
<a href="#">Column(Field) Change</a>		<input checked="" type="checkbox"/>	Update Year to Close
<a href="#">Column(Field) Change</a>		<input checked="" type="checkbox"/>	Update Quarter to Close
<a href="#">Column(Field) Change</a>		<input checked="" type="checkbox"/>	Update Month to Close

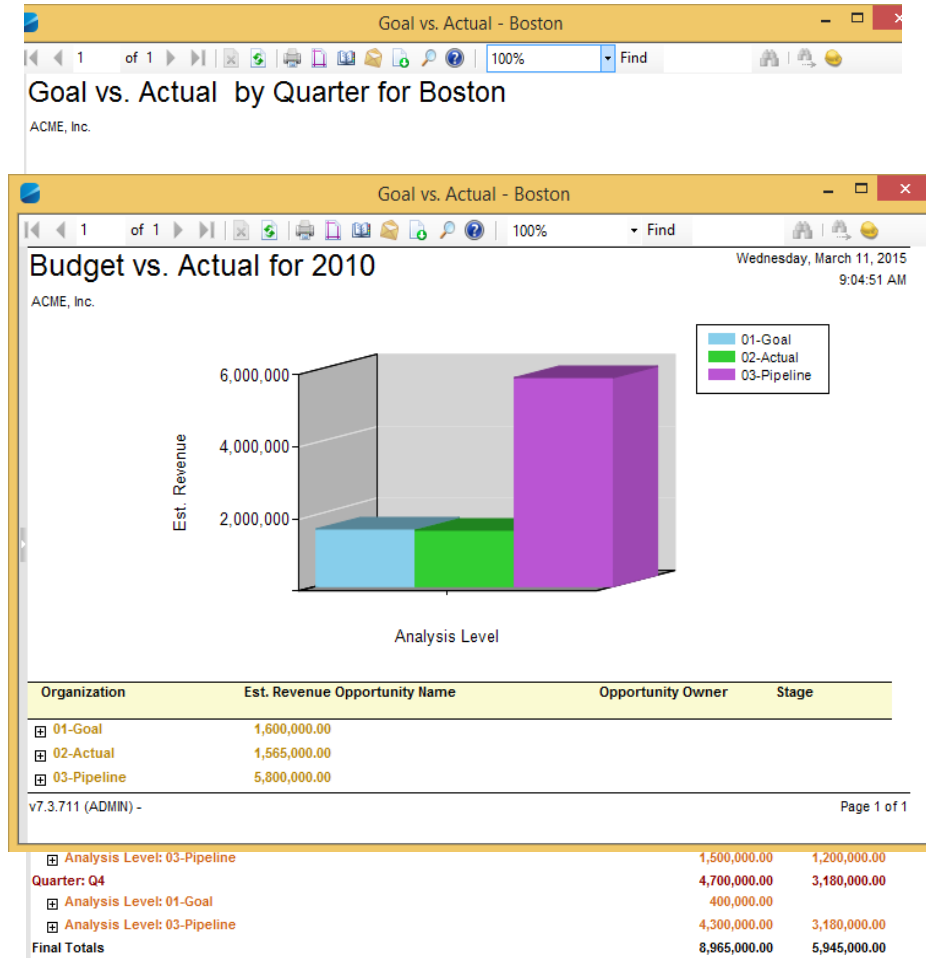


# Reports

- **Goal vs. Actual for Office**
  - By Quarter (or Month)
  - By Year

*Note: Use “Is Me” for Office*

Organization	Opportunity Name	Est. Revenue	Wt. Rev.
<b>Quarter: Q1</b>		<b>915,000.00</b>	<b>515,000.00</b>
+	Analysis Level: 01-Goal	400,000.00	
+	Analysis Level: 02-Actual	515,000.00	515,000.00
<b>Quarter: Q2</b>		<b>1,150,000.00</b>	<b>750,000.00</b>
+	Analysis Level: 01-Goal	400,000.00	
+	Analysis Level: 02-Actual	750,000.00	750,000.00
<b>Quarter: Q3</b>		<b>2,200,000.00</b>	<b>1,500,000.00</b>
+	Analysis Level: 01-Goal	400,000.00	
+	Analysis Level: 02-Actual	300,000.00	300,000.00
+	Analysis Level: 03-Pipeline	1,500,000.00	1,200,000.00
<b>Quarter: Q4</b>		<b>4,700,000.00</b>	<b>3,180,000.00</b>
+	Analysis Level: 01-Goal	400,000.00	
+	Analysis Level: 03-Pipeline	4,300,000.00	3,180,000.00
<b>Final Totals</b>		<b>8,965,000.00</b>	<b>5,945,000.00</b>

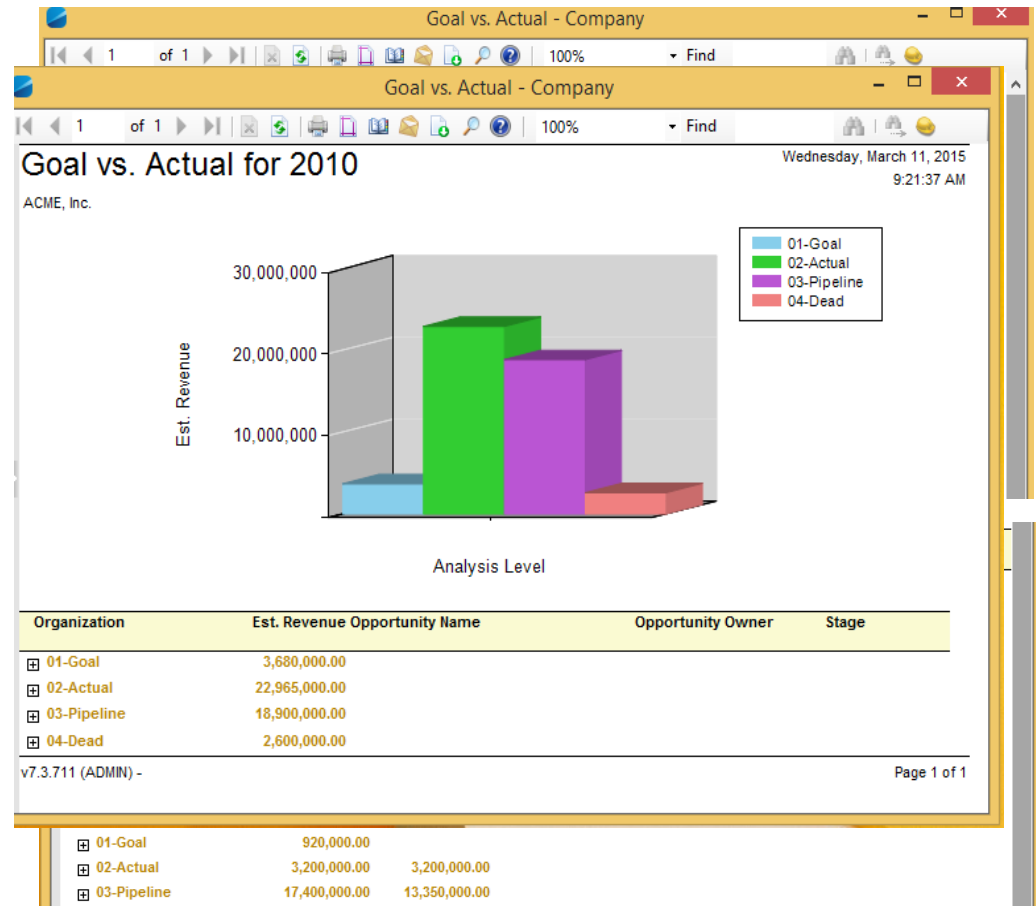




# Reports

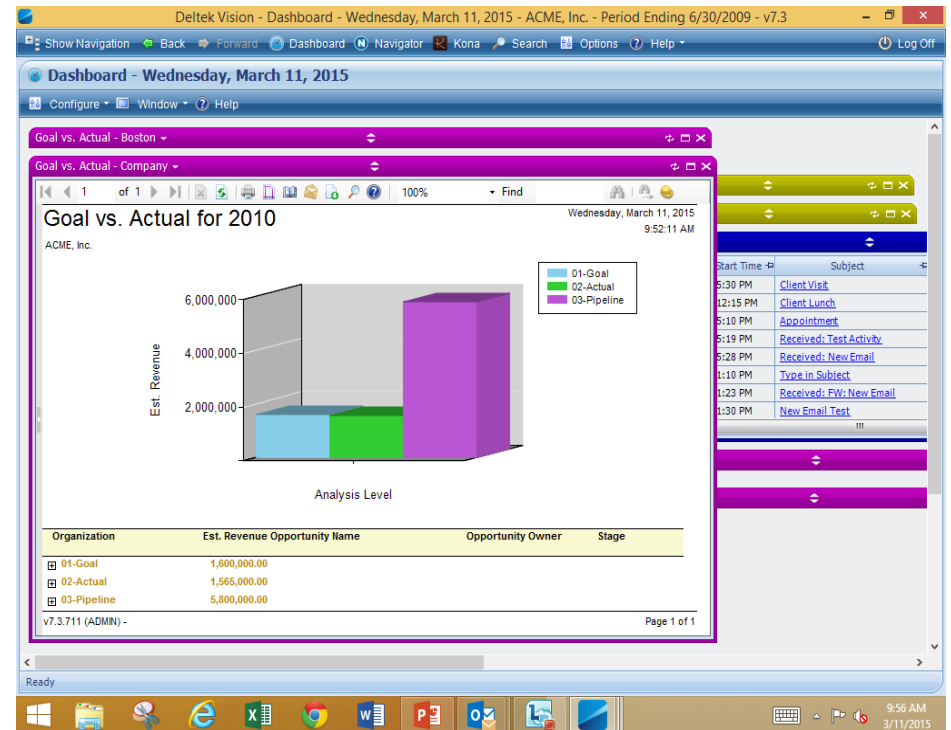
- **Goal vs. Actual for Company**
  - By Quarter (or Month)
  - By Year

Organization	Est. Revenue
+ 01-Goal	3,680,000.00
+ 02-Actual	22,965,000.00
+ 03-Pipeline	18,900,000.00
+ 04-Dead	2,600,000.00



# Dashboard

- **Goal vs. Actual**
  - Executives and marketing has a dashpart to display company goals
  - Dashpart to for each Department or Business Unit Lead
  - Graph and/or Report



# Benefits

- **Eliminated external reporting**
- **One place to view annual goals**
- **Executives have quick visual on how company success**
- **Business Unit Leaders have quick visual on dashboards and reports to drill down.**
- **Marketing loves graphic display vs. reports with all the detail**



# Questions?



***Want to learn more:***

***Webcast:*** Managing a CRM System and Beyond: <http://bit.ly/1p1EhVB>

***Need a CRM Consultant?***

Email: [info@fullsailpartners.com](mailto:info@fullsailpartners.com)

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Hearing what you have to say, whether criticism or praise, helps us provide you better information and service.

A feedback survey will be sent using the Client Feedback Tool.



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