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







Resources from Full Sail Partners:

Whitepapers & Publications

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

Events, Webinars and Resources

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

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



WebEx Instructions

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× 4	Participants		
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⊙ Pa	anelists: 2		
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3	Rick Childs		
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Ask: 7	All Panelists	Send	
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- 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.

Feedback	
My feedback	
Yes 🔻	Send
Yes	
No Too Fast Too Slow Applause Laughter	

- **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!





Rebekah Casey Corporate Marketing Information Manager



The Challenge

Divisions

ORL Commercial

ORL Commercial

Project Name

Orlando International Airport - Hensel

St Margaret Mary Catholic Pilot Wallet Card for

ORL Commer 🔻 Clearwater Aquarium

Phelps ORL Commercial Universal Studios

ORL Commercial Franklin Street Residential

ORL Commercial Westwood Memory Facility

ORL Commercial Seminole State College - Wellness Center

ORL Commercial St. Margaret Mary Church Expansion

ORL Commercial Seminole State College Project Name

ORL Commercial St. Luke's Lutheran Church National Village

Presentation

ORL Commercial St. Margaret Mary Church I

ORL Commercial Liberty Warehouse

Too many spreadsheets & forms

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

Difficulty Reconciling at

- Timesheets
- Pursuit cost close-out
- Materials charges

					Nasvhille Ad				0	unte Ad
							FIELD & GORRIE ing Material Charges			fo
Date	Coordinator	Items/Supplies	Unit Cost	Qty	Total	Region / Department	Pursuit Name or Person/Department Using Materials	Pursuit Number	Charge to Estimate/Cost Cod GL Code	e or Credit Account (For Will Only)
1/11/2013	Rebekah Light	Tabs/covers/backs	\$0.50	49	\$24.50	Region 3	FHO North Surgery Elevator Addition		13722.5501.0000004	5
1/11/2013	Rebekah Light	11x17 100 lb cover stock	\$0.75	14	\$10.50	Region 3	FHO North Surgery Elevator Addition		13722.5501.0000004	5
1/11/2013	Rebekah Light	Twin loop binding (all sizes)	\$1.00	7	\$7.00	Region 3	FHO North Surgery Elevator Addition		13722.5501.0000004	5
1/17/2013	Jennifer Foushee	Tabs/covers/backs	\$0.50	50	\$25.00	Region 4	Ensworth Natatorium - Suzanne Rosiles/Dan Armour		13746.1321.0159400	1
1/17/2013	Katie Long	Tabs/covers/backs	\$0.50	16	\$8.00	Region 3	FLH Winter Park South Wing		14067.5501.0000004	5
1/17/2013	Katie Long	11x17 100 lb cover stock	\$0.75	24	\$18.00	Region 3	FLH Winter Park South Wing		14067.5501.0000004	5
1/28/2013	Stacie Moore	Tabs/covers/backs	\$0.50	3	\$1.50	Region 4	Ft. Stewart Training Range		13035.5403.1300010	10
1/28/2013	Stacie Moore	CDs/DVDs with labels	\$1.00	3	\$3.00	Region 4	Ft. Stewart Training Range		13035.5403.1300010	10
1/28/2013	Stacie Moore	1/2" and 1" binders	\$3.00	3	\$9.00	Region 4	Ft. Stewart Training Range		13035.5403.1300010	10
1/28/2013	Stacie Moore	CD clam shell cases	\$1.00	3	\$3.00	Region 4	Ft, Stewart Training Range		13035,5403,1300010	0

Pursuit Number

13043.13000106

13043.14000108

13043.14000110

13043.14000112

13043.14000116

13043.14000117

13043.14000115

13043.14000118

Project Typ

Department

Related

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...

vnolds Plantation

Due Date

5/1/2014

4/17/2014

Project Type

PREQ

RFO

PREO

RFP

Bid

REO

RFQ

Division related Terrell, Adam

Young, John

REP

Estimating Number

16401

16402

Pennington, Skip

Zyryanov, Filipp 15368

Divisions G/L Codes

Pursuit Number/GL Code

ORL Commercial - 350221435.6950 7/8/2013

ORL Commercial - 350221435.6950 8/22/2014

ORL Commercial - 350221435.6950 8/27/2014

ORL Commercial - 350221435.6950 9/26/2014

ORL Commercial - 350221435.6950 10/31/2014

ORL Commercial - 350221435.6950 10/31/2014

ORL Commercial - 350221435.6950 11/4/2014

ORL Commercial - 350221435.6950 11/14/2014

Pilot Wallet Card for Aviation (10)

This isnt pursuit, Its a pricing book

nd clean up content in to be emailed out to compa

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Charging to Atl Mixed Use

Due Date 🕇

Project

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					Nashville Ad Football Prog		5/12/2014	Division related	 Hamilton, Natalie 	Moore, Stacie		Cre	ate Ad
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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

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Materials

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

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15 Clear Covers QTY	
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nding	
8 Twin loop binding (all sizes) QTY	
10 1/2" and 1" binders QTY	
6 1 1/2" binders QTY	
9 2" binders QTY	
D/Jump Drives	
15 CDs/DVDs with Labels QTY	
CD Clam Shell Cases QTY	
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

Zyryanov, Filipp Covers Breeland, Kelly 1/8/2015 R:\MarketingLibrary\Atlanta 7 O Vertical Spiral-bound Covertext: Image: Covertext:
Zyryanov, Filipp Presentation Breeland, Kely. 1/14/2015 R:(MarketingLibrary\Atlanta 1 Horizontal We would like a map of our Athens projects hig 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

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	Oracle Orlando Interior Renova	Raleigh Electrical Safety Summi	Duke Energy 21st Floor Renova	City of Raleigh SDMW08 Event	ACREcon 2015 Flyer Graphics	
	Hard Hat Stickers - HCA Medica	Orlando Sports and Entertainm	Jive Banner-Estimating Othe	Employee headshots backgroun	Crescent Communities Muti-Fa	
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25	26	27	28	29	30	
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	HCA IPD Presentation Graphic	Parish Life CenterExpansion I		Birmingham Business Journal A	Construction Mississippi Awards	
	Lester Memorial UMC Intervie	Avid Xchange Building RFP		HCA IPD Presentation Other	CBRE Requalification PREQ	
	Northwest Texas Health A3 - W Southeast Water Treatment Pla	HCA IPD Presentation Graphic		Duke Energy Center for the Per	CR3 ISFSI Pad EPC RFP Anit Test Test Graphics Rebekah	

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

	ue 1/27/2015 12:07 PM DeltekVisionAdmin_deltek@brasfieldgorrie.com						
To Casey, Rebel	Graphics Request for Casey, Rebekah						
To Casey, Reber	kan						
Pursuit: Test Pa	arking Deck						
Type of Graphic	cs: Special Tabs						
Requested By:							
Quantity: 6.00							
Orientation: Vertical							
Special Logo: N	N						
Draft Due: 1/27	/2015						
Final Due: 1/30/	/2015						
Assigned to: Ca	asey, Rebekah						
File Path to Sav	ve to: R:\MarketingLibrary\MASTER\Deltek\Deltek Additional Project Information Form						
Notes: Please i	nclude project photos						
Charge to:							
Pursuit #: 13060	D.14000106						
GL #: 34030943	5.5401						
Other #:							

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 Project Name Marketing Owner BG Pursuit Number ABC Carolinas Meet the Generals T Funk, Dana Raleigh Commercial 13059.14000123 Avid Xchange Building Funk, Dana Raleigh Commercial 13059.14000123	ting Owner + BG + Pursuit Number + Ana Raleigh Commercial ana Raleigh Commercial 13059.14000123 ana Raleigh Commercial 13059.14000125		Configure 🔹 🔲 Window 👻 🕐	Help				-	
ABC Carolinas Meet the Generals T Funk, Dana Raleigh Commercial Avid Xchange Building Funk, Dana Raleigh Commercial 13059.14000123	ana Raleigh Commercial 13059.14000123 ana Raleigh Commercial 13059.14000123 ana Raleigh Commercial 13059.14000125)ar	na's Pursuits 👻	÷				φ.	- :
Avid Xchange Building Funk, Dana Raleigh Commercial 13059.14000123	ana Raleigh Commercial 13059.14000123 ana Raleigh Commercial 13059.14000125		Project Name 🕂 🕂	Marketing Owner 👎	BG	-10	Pursuit Number	-12	4
	ana Raleigh Commercial 13059.14000125	Þ	ABC Carolinas Meet the Generals T	Funk, Dana	Raleigh Commercial				
CBRE Regualification Funk, Dana Raleigh Commercial 13059.14000125			Avid XchangeBuilding	Funk, Dana	Raleigh Commercial		13059.14000123		
	ana Raleigh Commercial 13059,15000101		CBRE Requalification	Funk, Dana	Raleigh Commercial		13059.14000125		
SAS Building A Funk, Dana Raleigh Commercial 13059.15000101			SAS Building A	Funk, Dana	Raleigh Commercial		13059.15000101		

Reports

- Pursuit close-out
- Materials charges
- Upcoming events

- Workload by resource
- Weekly graphics pursuit list

Neekly Graphics Purs	uit List					Tuesday, F	ebruary 10, 2015 8:55:48 AM
rasfield & Gorrie, LLC							0.33.40 AI
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	g 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

🥥 Opportunit	ies					Search	
🔡 Save 📄 New	v 🕆 🗡 Delete Opportunity 🛛 🖶	Print 🛪 🔀 Merge 🔹	😂 Email 🛪 🖪 Phot	to 🔹 🔏 List	View 🕡 Help		
Gilbert Elemen	itary School						
General Companies/C	ontads Proposal Data Proposed Ser	vices Activities Team	Files Proposal Team M	larketing Cam	paigns Estimated Revenue	Service Estimate l	ocation Pro
Name	Gilbert Elementary School		Number 092002		Status	Inactive	-
City	Washington	State/Province	Washington, DC	-	Project Significance		-
					Project Associations		
Organization	Atlanta Engineering	Principal-In-Charge	Apple, William	\searrow	Add Service/Task Order?	No	-
Primary Company	City of Memphis	Project Manager	Anderson, Steve	\sim	Client Project #		
Primary Contact	Davis, Mary Sue	Opportunity Owner		\searrow	Promo Project		\wp
Revenue	2,600,000.0	0 Type	Educational Facilities	-	Original Project		\mathbf{P}
Probability 😡	100 V Award	Stage	4-Proposal Submitted		Reg. Project	0000020.03	\sim
Weighted Revenue	2,600,000.00	Source	FedBizOpps	•	Project Plan	-	\mathcal{P}
Proposal Due Date	8/29/2009	Date Opened	6/12/2008	31	Date Closed		31
Interview Date	31	Anticipated Win Date	e 8/29/2010	31	Quarter	Q3	-
Proj. Est. Start	10/13/2010	Analysis Level	03-Pipeline	-	Month	08 - August	-
Proj. Est. Completion	8/1/2011				Year	2010	-
					Days Open	2463	
Closed Reason	•	Next Action	n Date	31			
Closed Notes	/ Edit	Next Acti	on Task		/ Edit		
					~		



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	6/12/2008	31	Date Closed		31
Anticipated WinDate	8/29/2010	31	Quarter	Q3	•
Analysis Level	03-Pipeline	-	Month	08 - August	-
			Year	2010	-
			Days Open	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

2	Save 븕 Print 🛛 🕐 Help							
	the rest of the rest							
App	plication Opportunities							
W	orkflows 🔹			4	Insert [Copy 🗙 Delete	🏠 Move Up	Mov
	Workflow Table -≠	Workflow Typ	e +⊐	Level	- Active-		Description	
	[Opportunity Record]	Change				Proposal Loss		
	[Opportunity Record]	Change				Opportunity Go/No-Go C	alculations	
	[Opportunity Record]	Change				When Stage changes to W	riting Proposal	
	[Opportunity Record]	Change				Opportunity Award to Pro	ject Initiation	
	[Opportunity Record]	Change				Proposal Win	-	
	[Opportunity Record]	Insert/Associa	te			Proposal Due Date Adde	d Upon Creation	
۲	[Opportunity Record]	Change				Anticipated Win Datehas	changed	
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_	Action +	Level -Þ/	Active -			Description		-12
	Column (Field) Change		•	Update Year				
•	Column (Field) Change		•	Update Quar				
	Column (Field) Change		✓	Update Mont	to Close			

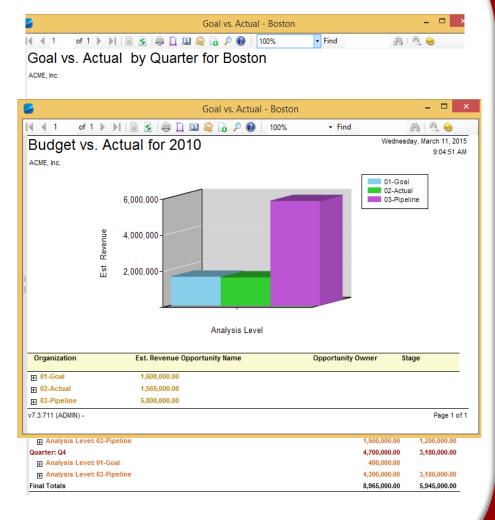
Reports

Goal vs. Actual for Office

- By Quarter (or Month)
- By Year

Note: Use "Is Me" for Office

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

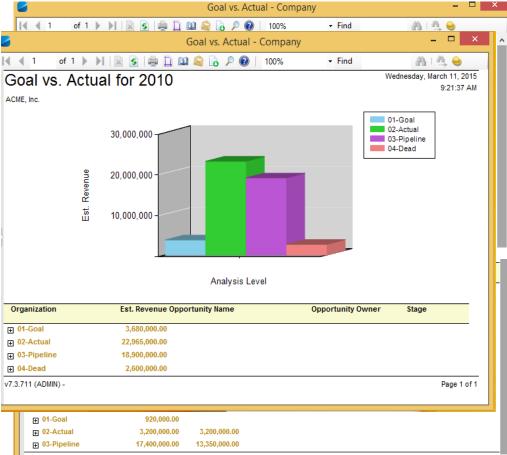


Reports

Goal vs. Actual for Company

- By Quarter (or Month)
- By Year

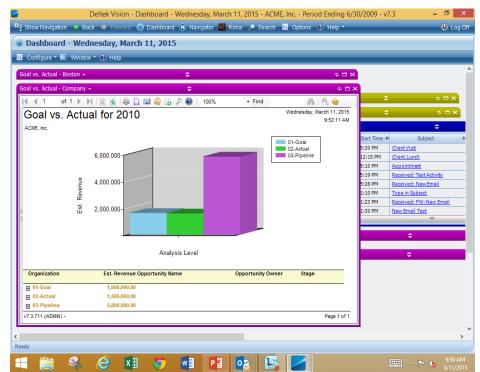
Organization	Est. Revenue
⊕ 01-Goal	3,680,000.00
O2-Actual	22,965,000.00
O3-Pipeline	18,900,000.00
⊕ 04-Dead	2,600,000.00



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: <u>http://bit.ly/1p1EhVB</u>

Need a CRM Consultant? Email: info@fullsailpartners.com

Give Us Feedback!

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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