

Advanced Marketing in Deltek Vision: Better Budgeting, Visible Value

Presented by: Ken Higa, Perkins + Will
Kevin Hebblethwaite, Full Sail Partners



Agenda

1. Resources
2. WebEx Instructions
3. Presentation: Advanced Marketing in Deltek Vision
4. Questions

Keep your business
on *course*.

Full Sail Partners



Other resources from Full Sail Partners:

Events, Webinars and Resources

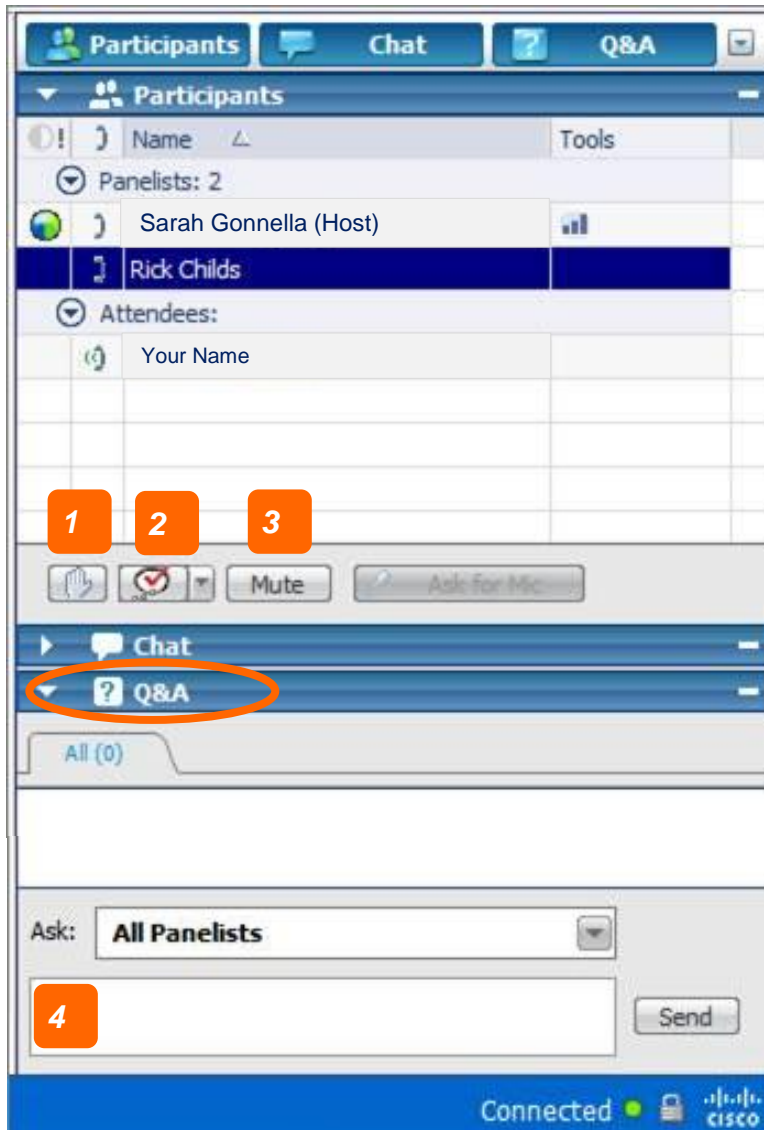
- July 17 | Do More With Deltek iAccess for Vision
<http://bit.ly/1Hal2hd>
- August 12 | Build a Better A&E Firm: Mastering Resource Planning
<http://bit.ly/1RkoGjN>
- Attend Future Full Sail Partners' User Groups
<http://bit.ly/URI1K0>

Whitepapers & Publications

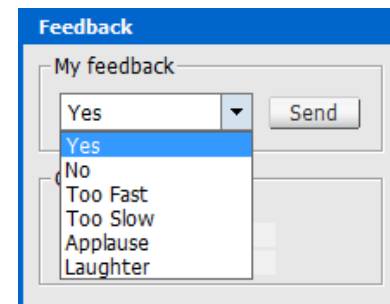
- Client Feedback – Don't Wait 'Till It's Too Late!
<http://bit.ly/1sElgYg>
- Full Sail Partners Blog
<http://bit.ly/1J5vZV>

Join The Full Sail Partners' User Group Space on Kona:
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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.)



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)



**CONTEXT:
WHY WE ARE THE
WAY WE ARE....**

**IN THE
BEGINNING....
MARKETING WAS
FORBIDDEN.**

In 1909...



Adopted first Principles of Practice

- Barred architects from marketing
- AIA Fee Schedule

ABSOLUTELY

NO

ADVERTISING

JOB SIGNS

PROPOSALS

FREE

SKETCHES

or

EXAGGERATED

or

**SELF-
LAUDATORY
LANGUAGE**



MARKETING =



Status Quo for 63 Years

1972



~~AIA Fee
Schedule~~



Marketing

Bates v. State Bar of Arizona

- *Sherman Antitrust Act*
- *Free Speech*

1990

Additional DOJ investigation & lawsuit led to end of any possible opportunity to restrict fee competition.



1970 > 2010



RECESSIONS:

'70s, '80's, early
90's, 2000's &
Great Recession
2007-2009



COMPETITION:

The number of
architects more
than doubled
between 1970 and
1980

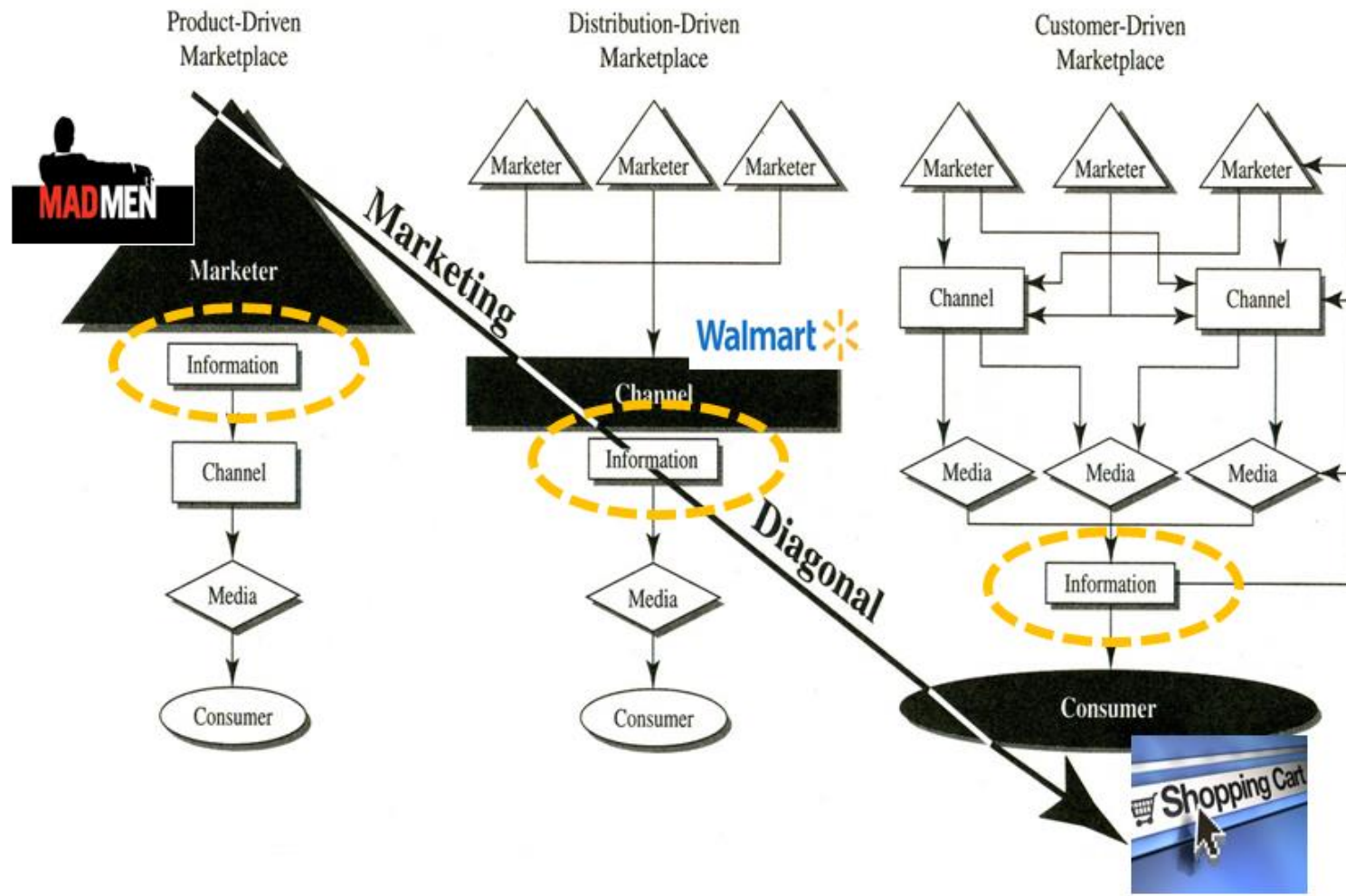


TECHNOLOGY:

Personal
Computers
Graphic Software
The Internet
Email
CAD / BIM / REVIT



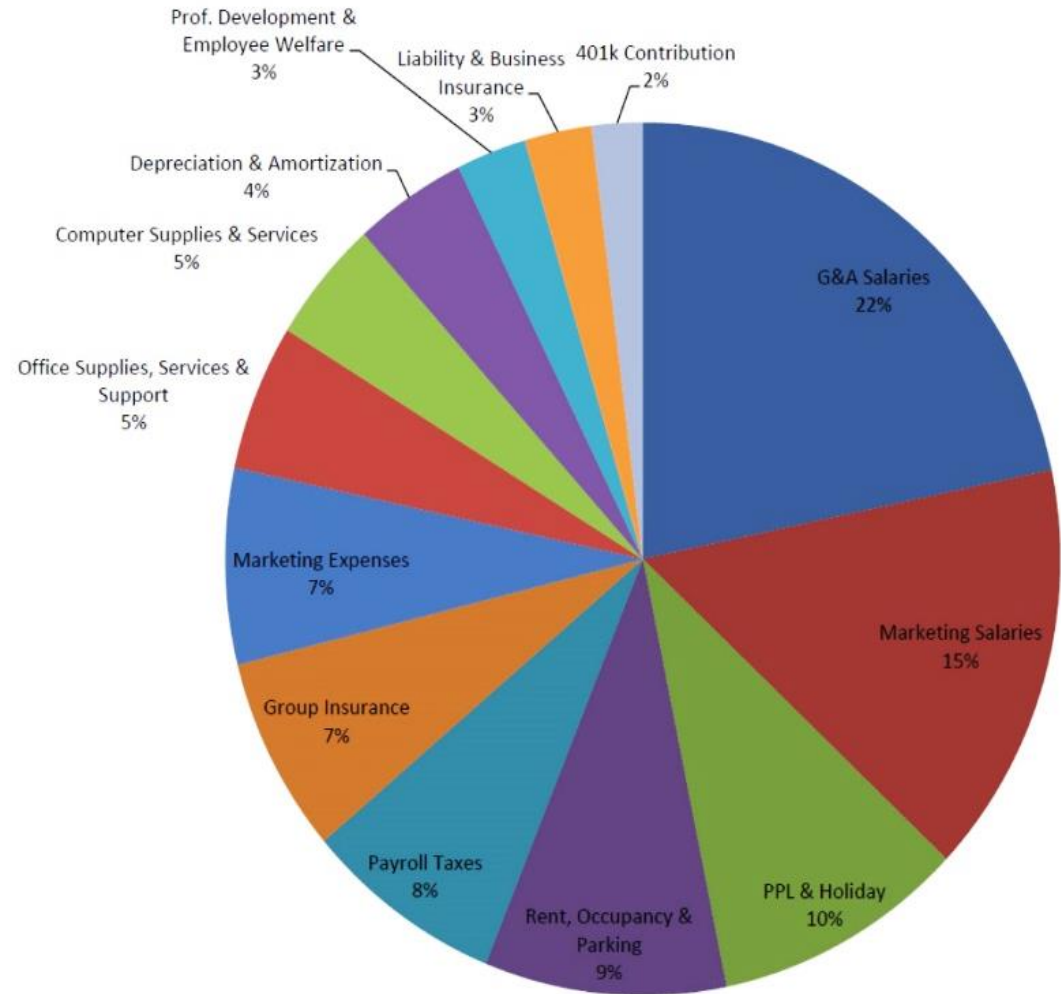
Information = Power



- **A relatively short history in which we have embraced marketing**
- **Business acumen is still not part of the core curriculum of our formal education**
- **The world is changing at a fast pace – and we were already behind.**

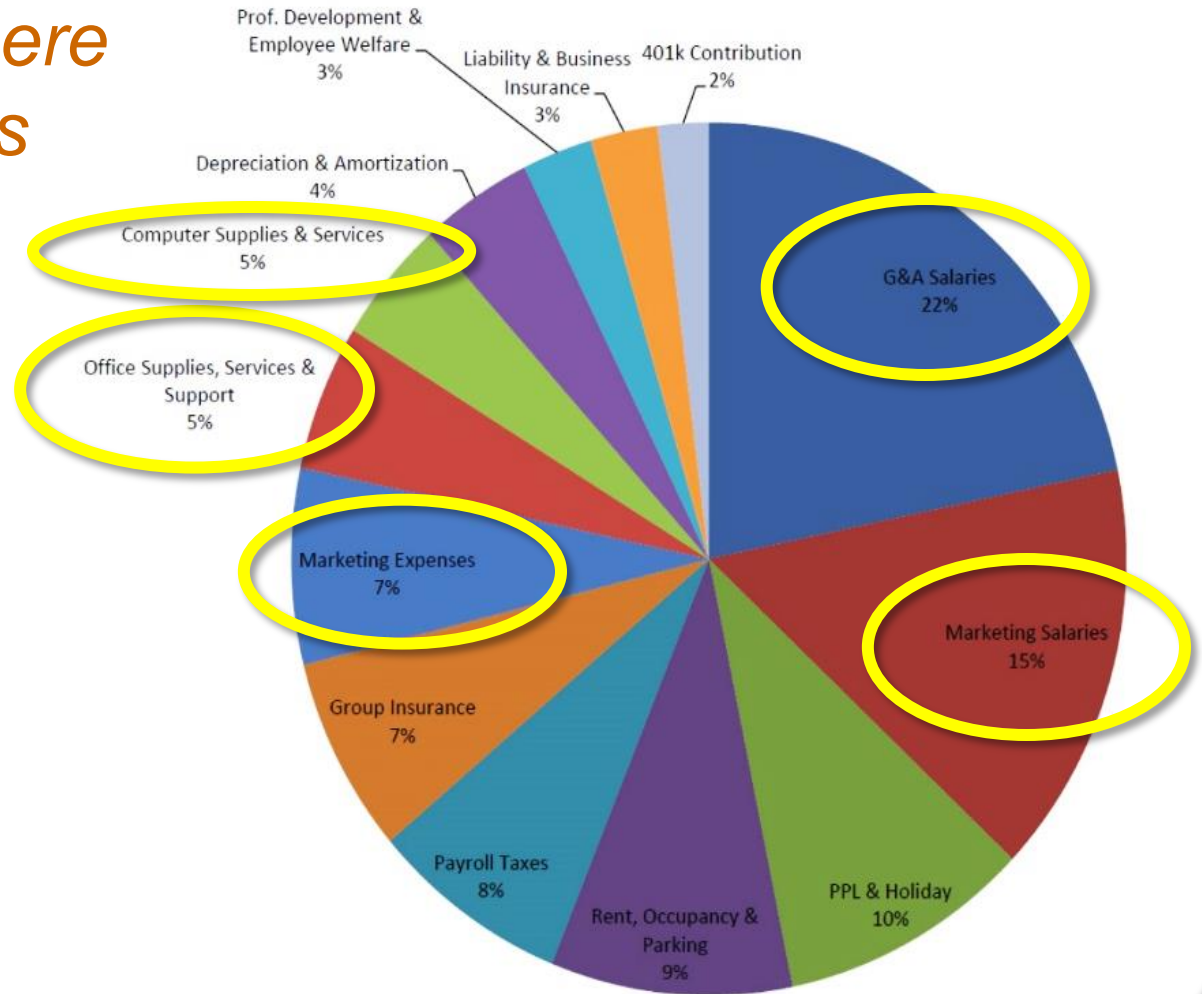


Accounting Team's View of the World



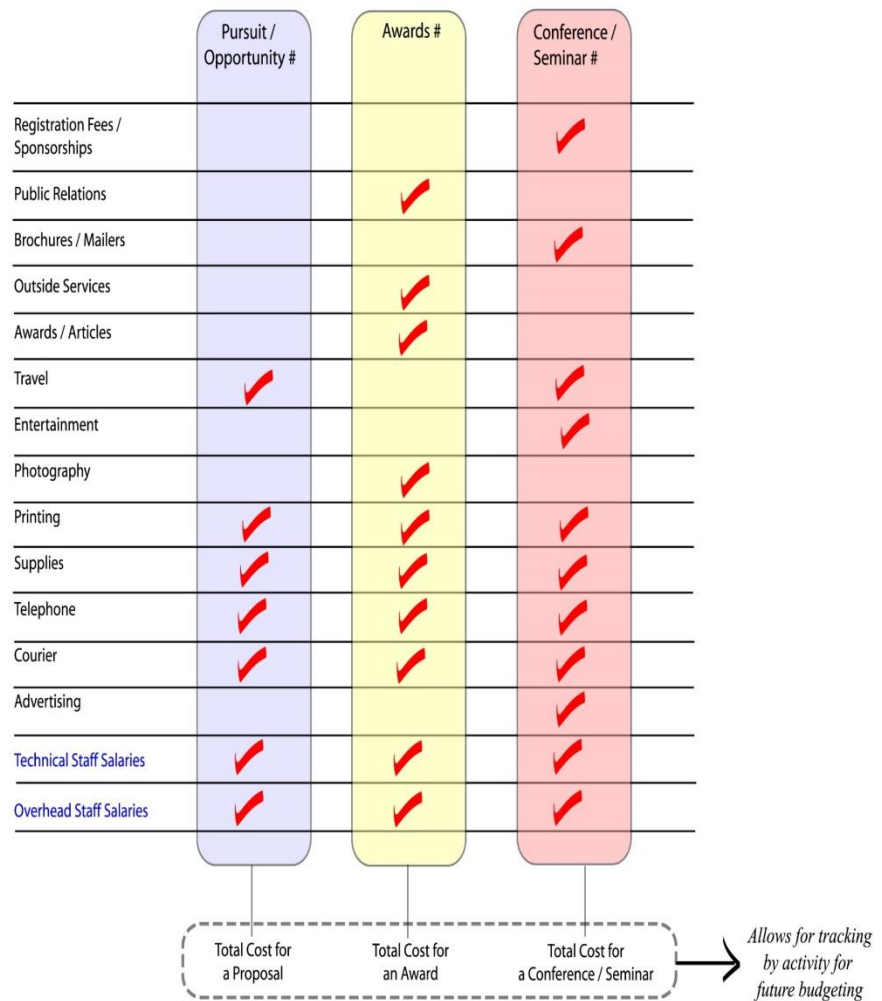
Accounting Team's View of the World

Categories Where Marketing Lives



Activity-Based Budgeting

- Tracks total time and expenses for key Marketing Activities (i.e. marketing project numbers)
- Allows for easy evaluation of activities for ROI
- Creates individual accountability and has the potential to change bad behavior
- Tracks Mktg Staff time to specific activities



What Should You Track?

Track only what you want to measure.

Marketing (Project) Numbers:

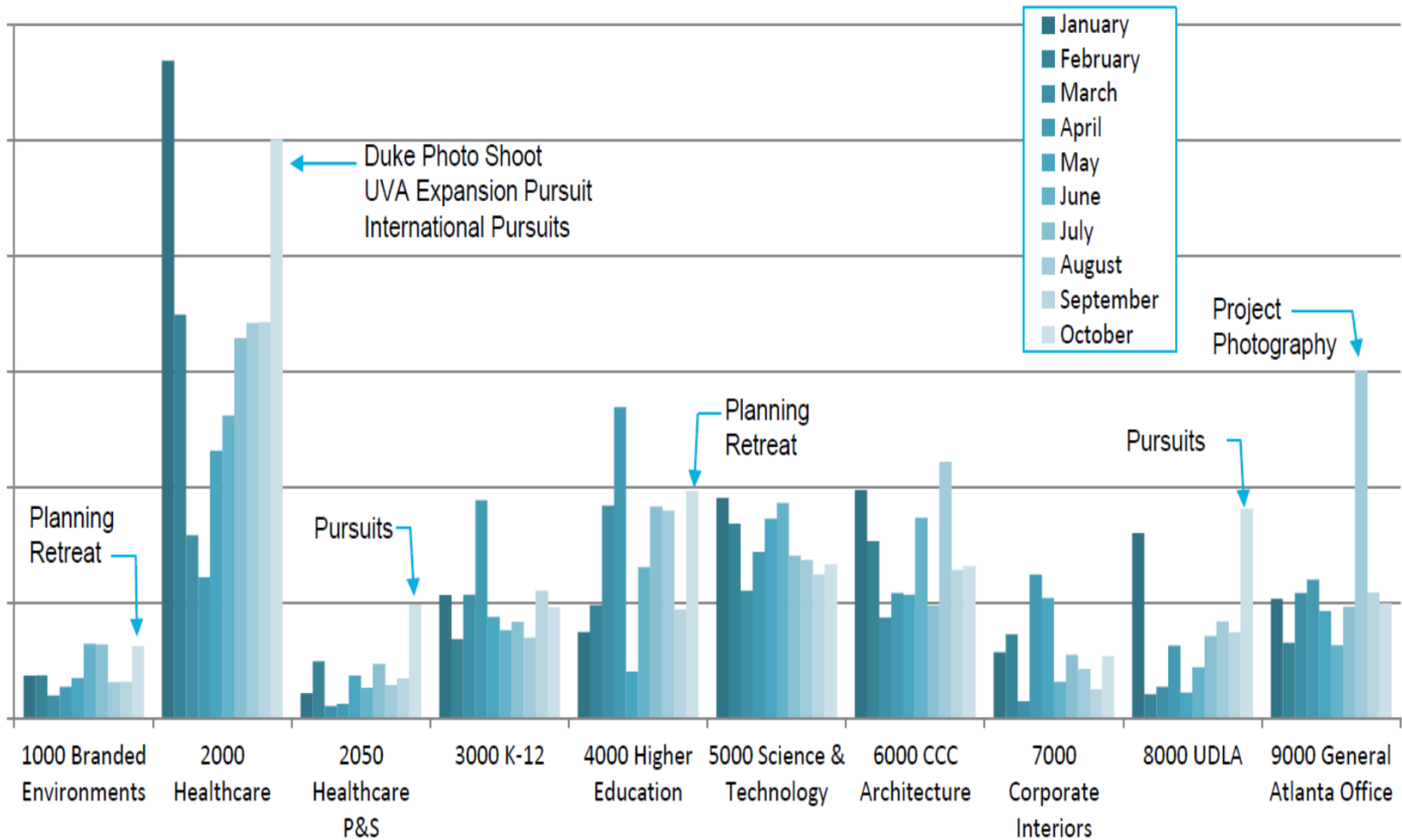
- Pursuits / Opportunities
- Photography
- Business Development
- Conferences / Seminars
- Public Relations
- Sponsorships / Donations
- Awards
- General [Catch-all Bucket]

Breakdown By Meaningful Groups:

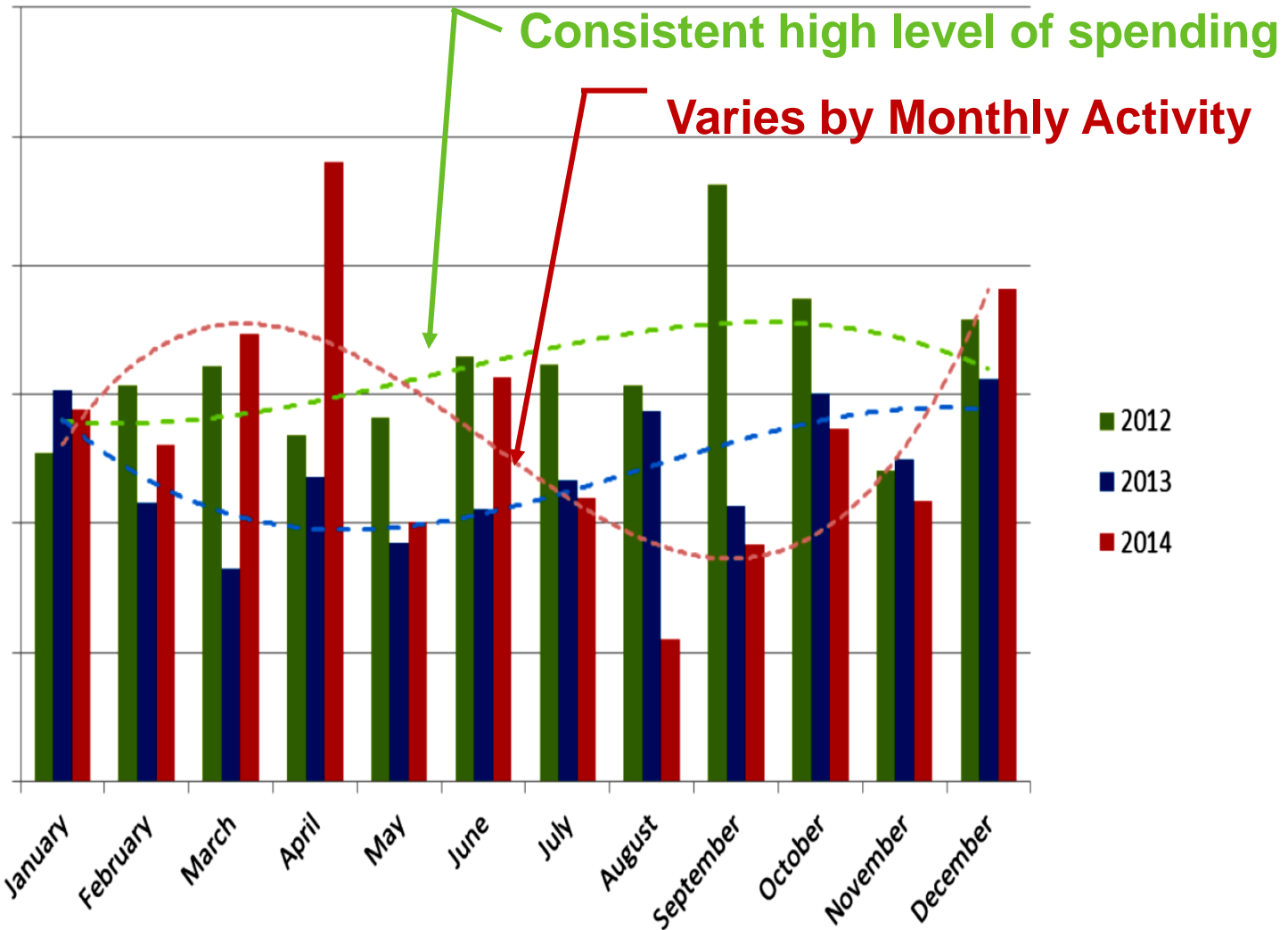
- OFFICE
- STUDIO
- PRACTICE
- GROUP

*Track down
to the
individual
[timesheet]*



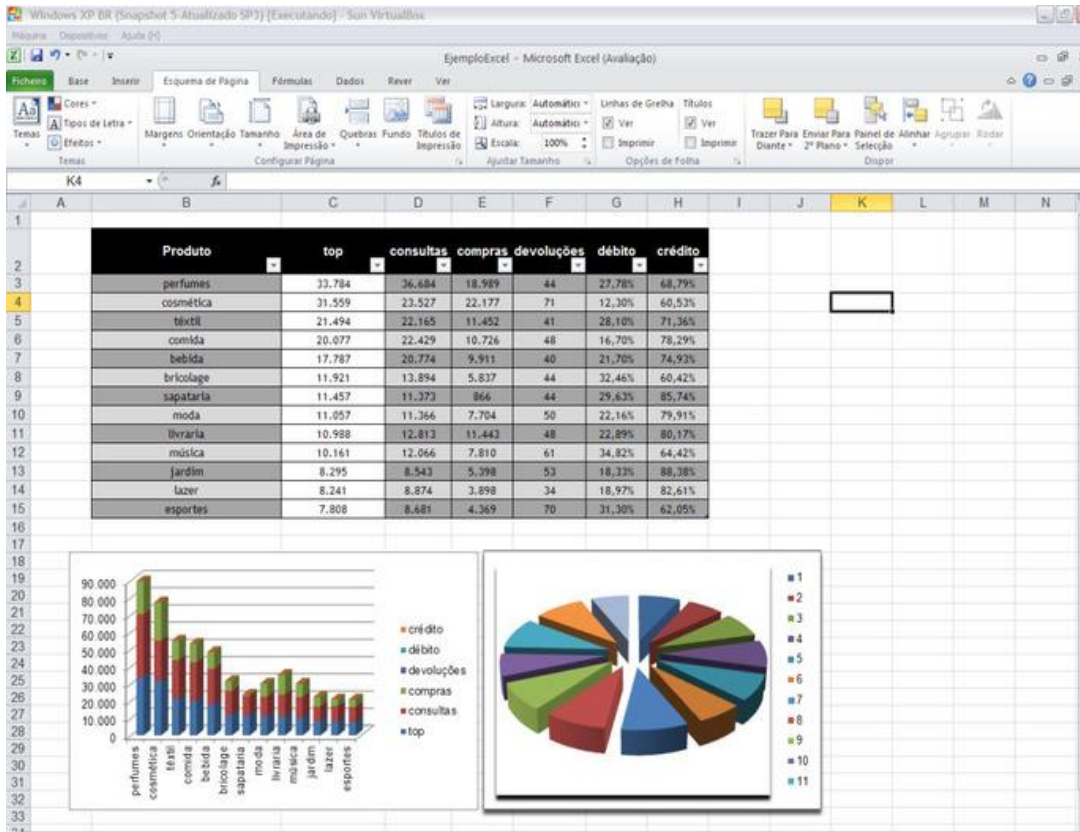


Changing Behavior



EXCEL is Your Friend

Deltek

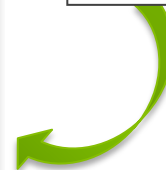


Credit Card Reconciliation

Coler & Associates LLC For the period 6/1/2011 - 6/30/2011 Tuesday, May 28, 2012 1:42:23 PM

Name	Expense Desc	Category Desc	Credit Card Post Date	Trans Date	Project Number	Amount	Account Desc	Amount
April								
Credit Card: Master Card								
Alexander Ftz	Computer Internet Service	Master Card 502010	4/30/2011	201405-00	702.00		Misc Expenses Recovery	47.47
Alexander Ftz	Corporate Meals	Master Card 502010	4/4/2011	201405-00	702.00		Misc Expenses Recovery	19.00
Alexander Ftz	Corporate	Master Card 502010	4/8/2011	201405-00	702.00		Misc Expenses Recovery	41.03
Alexander Ftz	Computer Expenses	Master Card 502010	4/11/2011	201405-00	702.00		Misc Expenses Recovery	47.47
Total for Master Card								154.97
April								
Credit Card: Master Card								
Alexander Ftz	Corporate Meals	Master Card 502010	8/4/2011	201405-00	702.00		Misc Expenses Recovery	24.71
Alexander Ftz	Computer Internet Service	Master Card 502010	8/18/2011	201405-00	702.00		Misc Expenses Recovery	47.47
Total for Master Card								72.18
August								
Credit Card: Master Card								
Alexander Ftz	Corporate Meals	Master Card 502010	2/7/2011	201405-00	702.00		Misc Expenses Recovery	27.50
Alexander Ftz	Corporate Meals	Master Card 502010	2/11/2011	201405-00	702.00		Misc Expenses Recovery	28.36
Alexander Ftz	Corporate Meals	Master Card 502010	2/14/2011	201405-00	702.00		Misc Expenses Recovery	28.00
Alexander Ftz	Computer Internet Service	Master Card 502010	2/18/2011	201405-00	702.00		Misc Expenses Recovery	47.47
Alexander Ftz	Employee Reimburse	Master Card 502010	2/19/2011	900110-00	801.00		Online Compensation	281.00
Total for Master Card								477.33
January								
Credit Card: Master Card								
Alexander Ftz	Corporate Meals	Master Card 502010	1/11/2011	201405-00	702.00		Misc Expenses Recovery	30.00
Alexander Ftz	Computer Internet Service	Master Card 502010	1/18/2011	201405-00	702.00		Misc Expenses Recovery	47.47

4/2,300 (4/20/10) Page 1 of 3

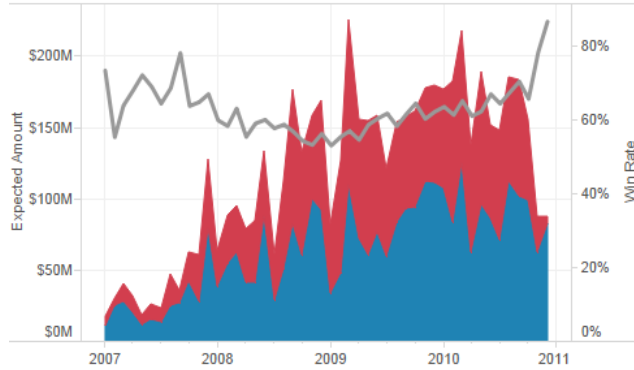




Opportunity Dashboard

Opportunity_CreatedDate 1/9/2007 12:00:00 AM to 12/30/2010 12:00:00 AM	Region All	Country Multiple Values	IsClosed Multiple Values
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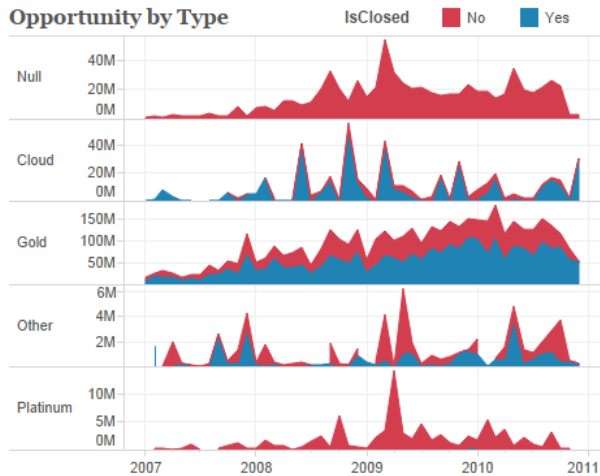
Opportunities and Win Rate



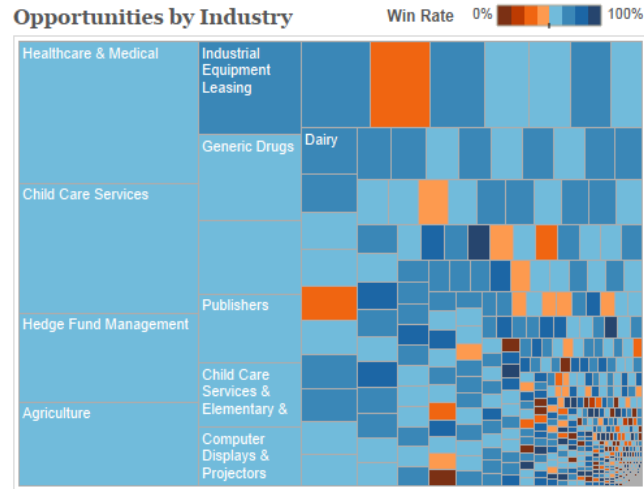
Opportunity by Location



Opportunity by Type



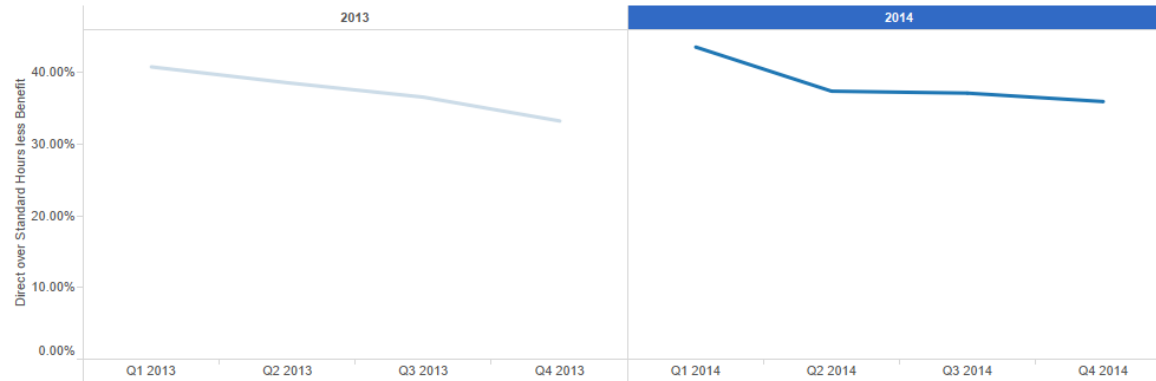
Opportunities by Industry



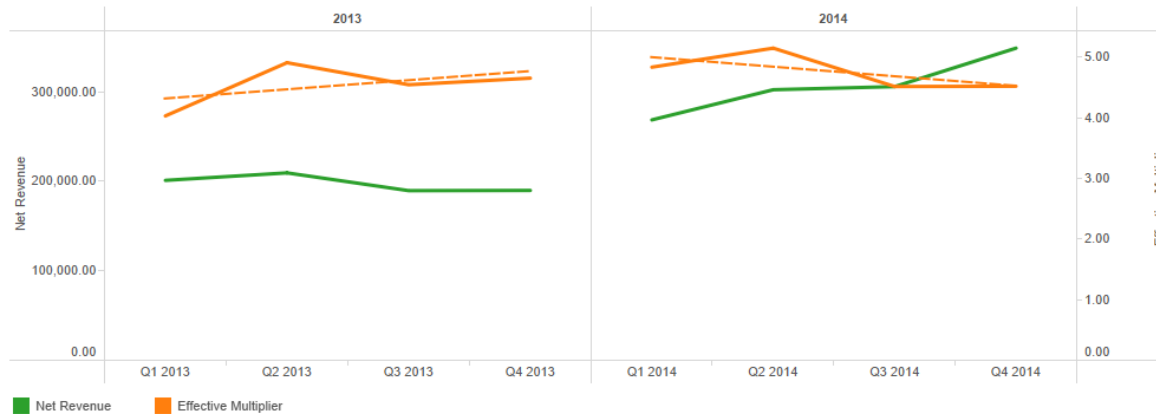
Identify Your Weakness

How are my staff and projects doing?

Staff Utilization over time



Revenue and multiplier



QUESTIONS?



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Thank you for attending!

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helps us provide you better information and service.

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