privia

2019 User Conference

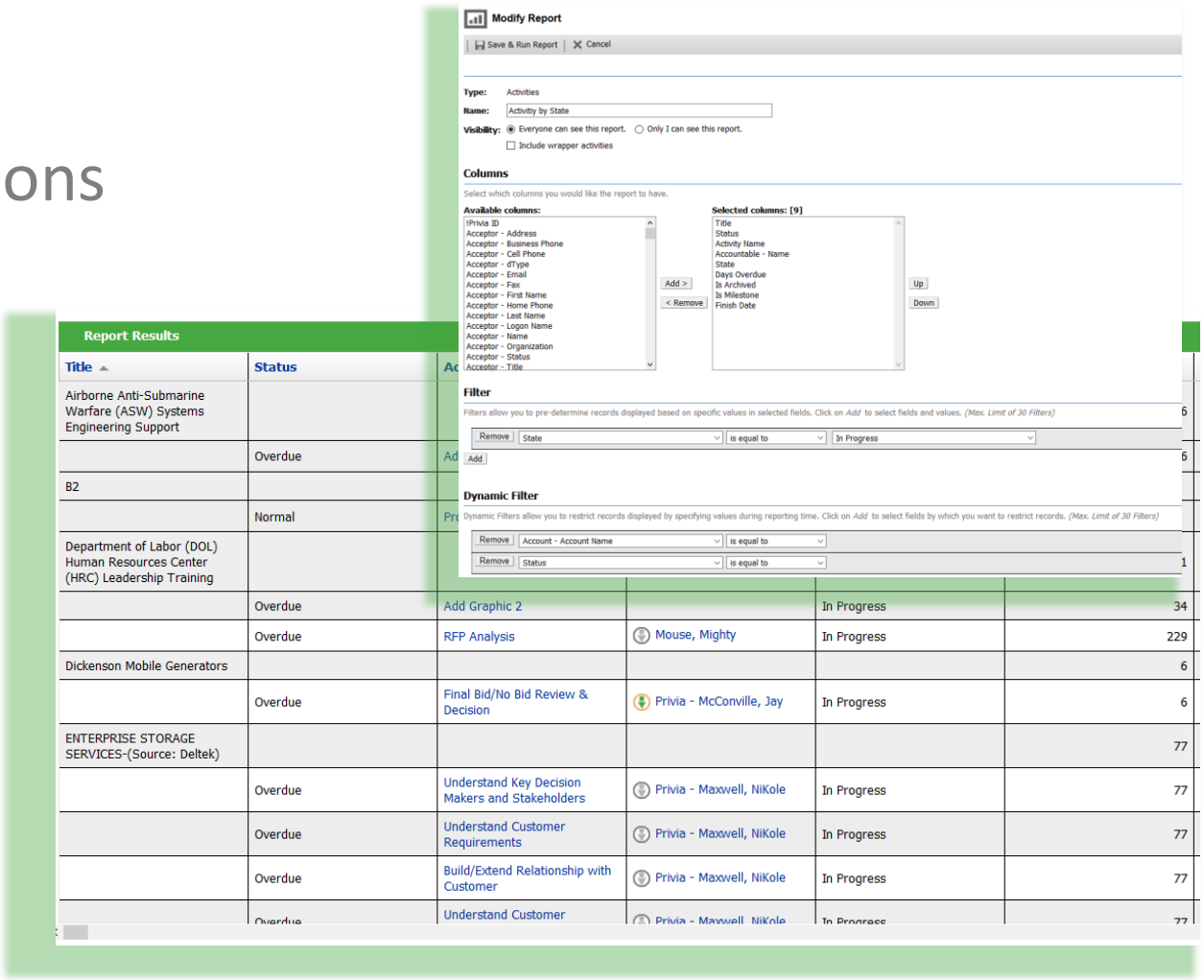
INFORM. EDUCATE. INSPIRE

Proposal Reporting

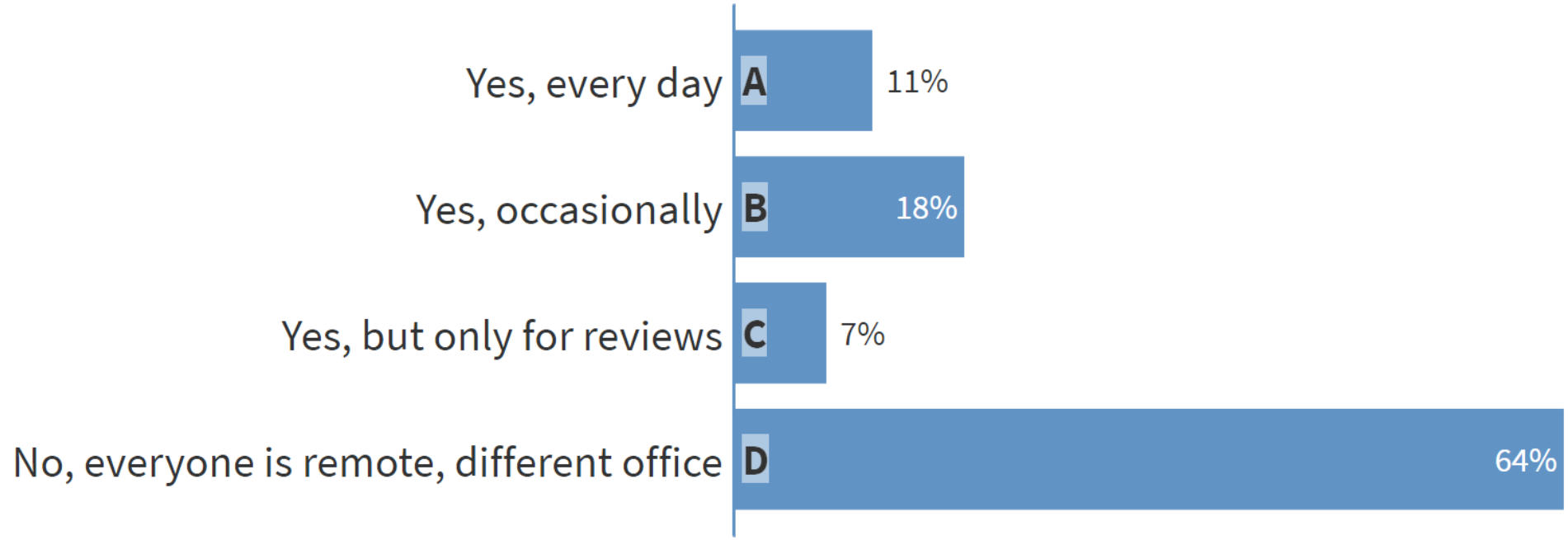
Richard Whiteoak
Technical Support Manager
Privia

Privia Reporting Engine

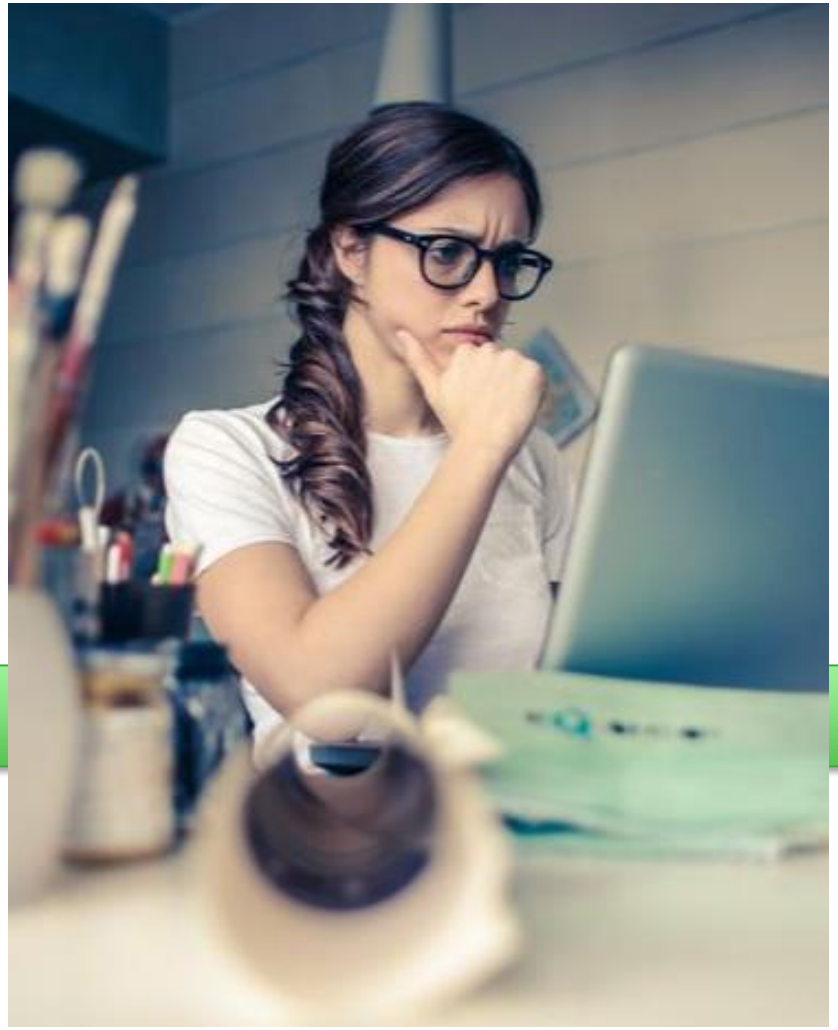
- Brief Overview
- Review Permissions
- Report Types
- Live Demo
- Refine & Target



Do you see the people you write proposals with?



How Do You Know?

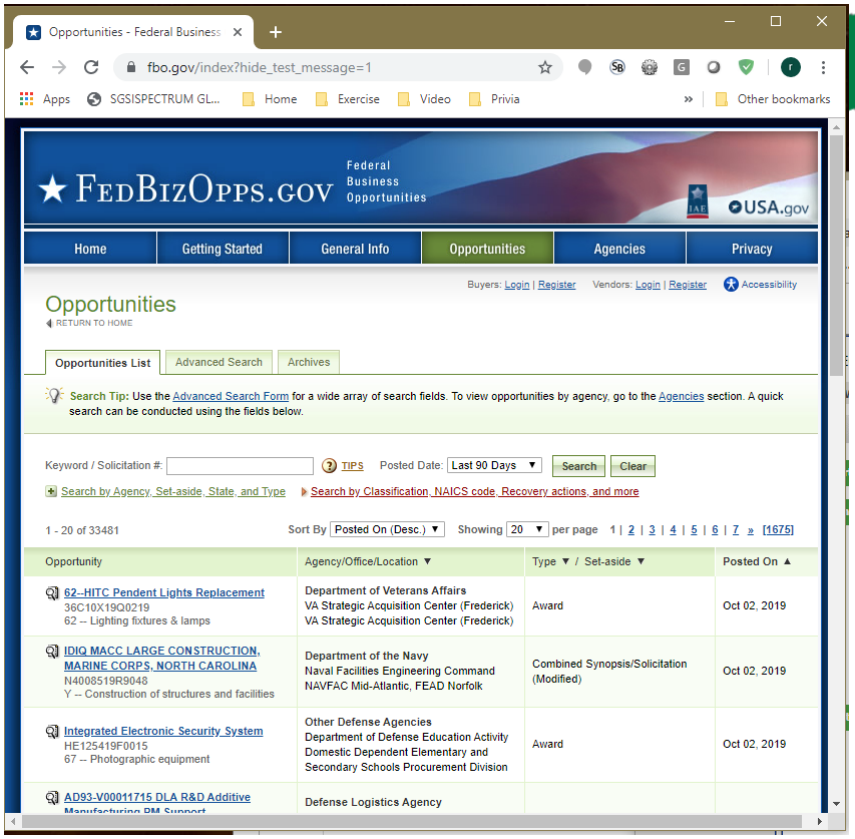


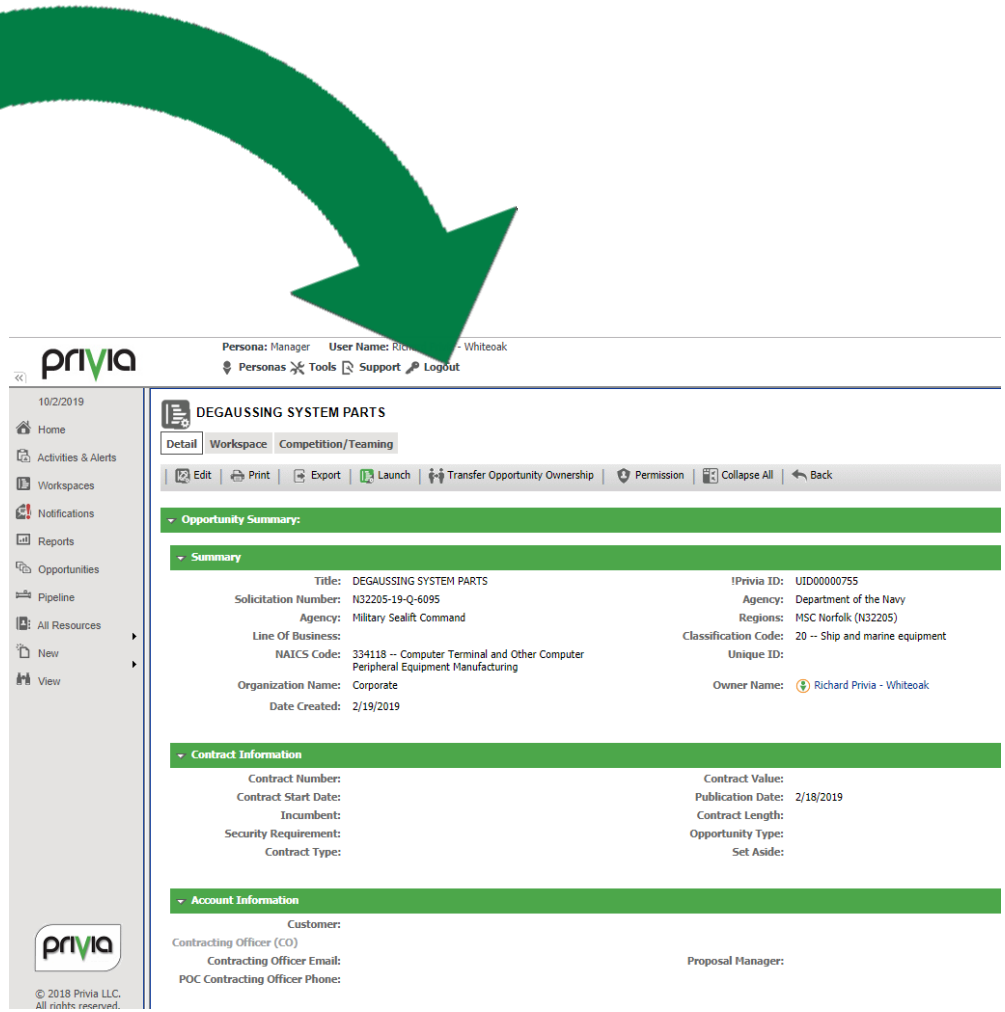
- Email?
- Phone Calls?
- Walk the Halls?
- Meetings?
- Activity Reports

Privia Overview

- Capture Opportunity Data
- Assign Tasks/Activities with a repeatable process
- Collaborate
- Produce Response
- Submit
- Repeat

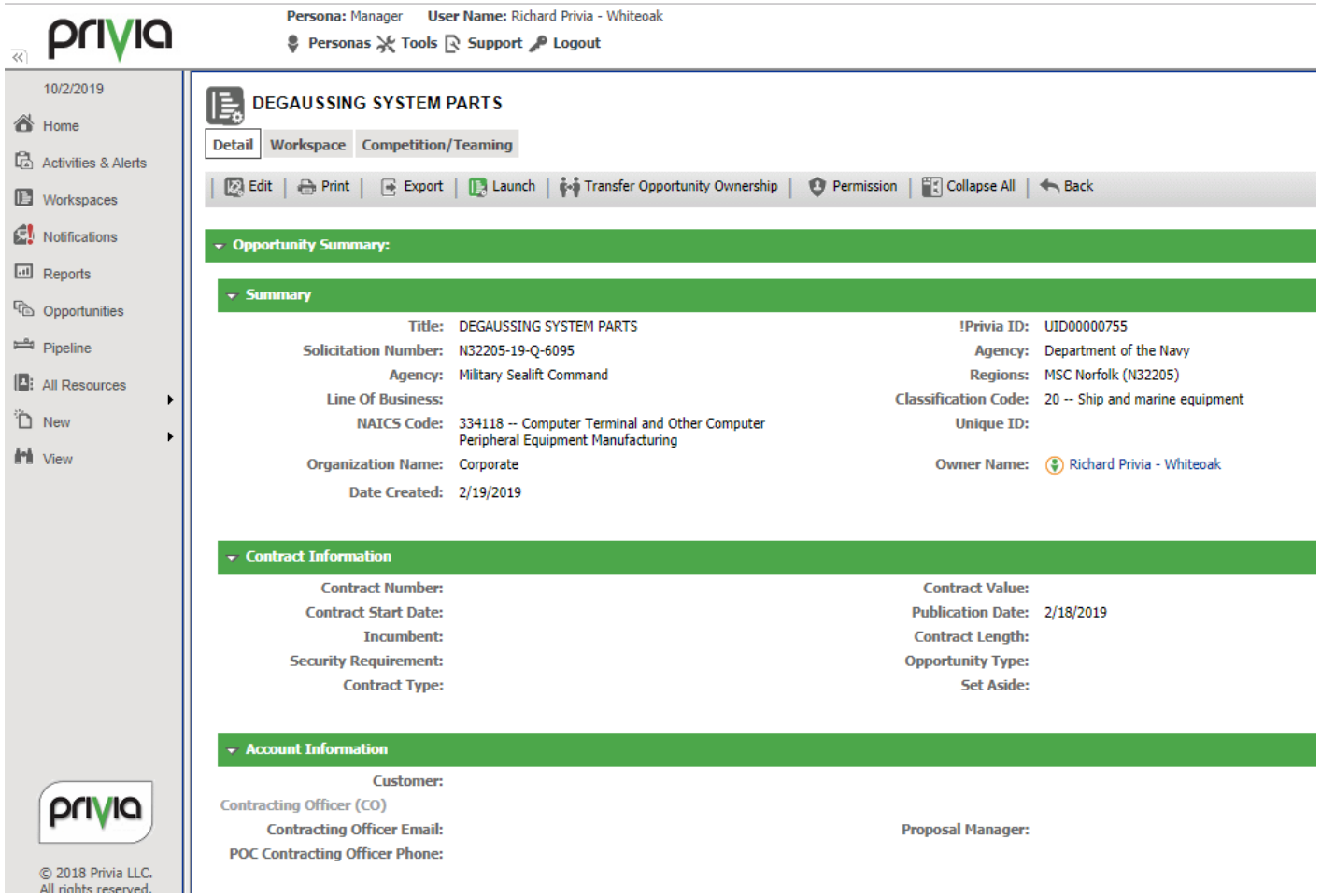
Privia Overview - Capture



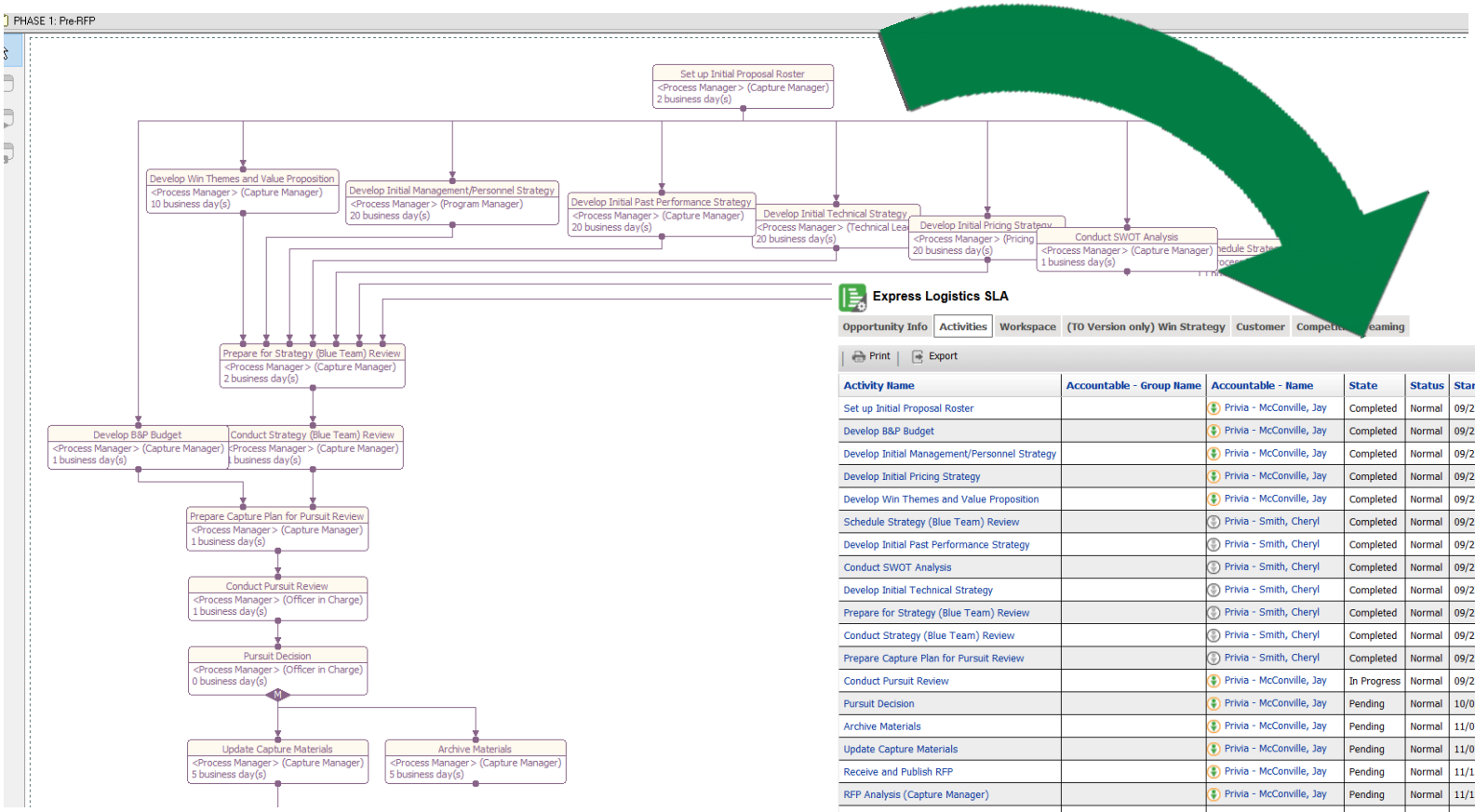


FBO, GovWin, Salesforce, SugarCRM

Privia Overview - Capture



Privia Overview - Process to Activities



Express Logistics SLA

Opportunity Info | Activities | Workspace | (TO Version only) Win Strategy | Customer | Competi... | ...eaming

Print | Export

Activity Name	Accountable - Group Name	Accountable - Name	State	Status	Start Date	Finish Date	Days Overdue
Set up Initial Proposal Roster		Privia - McConville, Jay	Completed	Normal	09/27/2019	09/27/2019	
Develop B&P Budget		Privia - McConville, Jay	Completed	Normal	09/27/2019	09/27/2019	
Develop Initial Management/Personnel Strategy		Privia - McConville, Jay	Completed	Normal	09/27/2019	09/27/2019	
Develop Initial Pricing Strategy		Privia - McConville, Jay	Completed	Normal	09/27/2019	09/27/2019	
Develop Win Themes and Value Proposition		Privia - McConville, Jay	Completed	Normal	09/27/2019	09/27/2019	
Schedule Strategy (Blue Team) Review		Privia - Smith, Cheryl	Completed	Normal	09/27/2019	09/27/2019	
Develop Initial Past Performance Strategy		Privia - Smith, Cheryl	Completed	Normal	09/27/2019	09/27/2019	
Conduct SWOT Analysis		Privia - Smith, Cheryl	Completed	Normal	09/27/2019	09/27/2019	
Develop Initial Technical Strategy		Privia - Smith, Cheryl	Completed	Normal	09/27/2019	09/27/2019	
Prepare for Strategy (Blue Team) Review		Privia - Smith, Cheryl	Completed	Normal	09/27/2019	09/27/2019	
Conduct Strategy (Blue Team) Review		Privia - Smith, Cheryl	Completed	Normal	09/27/2019	09/27/2019	
Prepare Capture Plan for Pursuit Review		Privia - Smith, Cheryl	Completed	Normal	09/27/2019	09/27/2019	
Conduct Pursuit Review		Privia - McConville, Jay	In Progress	Normal	09/27/2019	10/01/2019	1
Pursuit Decision		Privia - McConville, Jay	Pending	Normal	10/02/2019	11/06/2019	
Archive Materials		Privia - McConville, Jay	Pending	Normal	11/07/2019	11/13/2019	
Update Capture Materials		Privia - McConville, Jay	Pending	Normal	11/07/2019	11/12/2019	
Receive and Publish RFP		Privia - McConville, Jay	Pending	Normal	11/13/2019	11/13/2019	
RFP Analysis (Capture Manager)		Privia - McConville, Jay	Pending	Normal	11/13/2019	11/14/2019	
RFP Analysis (Prop Manager)			Pending	Normal	11/13/2019	11/14/2019	
RFP Analysis (Pricing)		Privia - Whiteoak, Richard	Pending	Normal	11/13/2019	11/14/2019	
RFP Analysis (Contracts)		Privia - McConville, Jay	Pending	Normal	11/13/2019	11/14/2019	
RFP Analysis (Legal)		Privia - McConville, Jay	Pending	Normal	11/13/2019	11/14/2019	
Develop Questions for RFP		Privia - McConville, Jay	Pending	Normal	11/13/2019	11/26/2019	
RFP Analysis (Technical Lead)		Privia - McConville, Jay	Pending	Normal	11/13/2019	11/14/2019	
Conduct Bid/No Bid Review		Privia - McConville, Jay	Pending	Normal	11/15/2019	11/15/2019	

Privia Overview

- Capture Opportunity Data
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- Collaborate
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Persona Demo

Permissions: Contributor

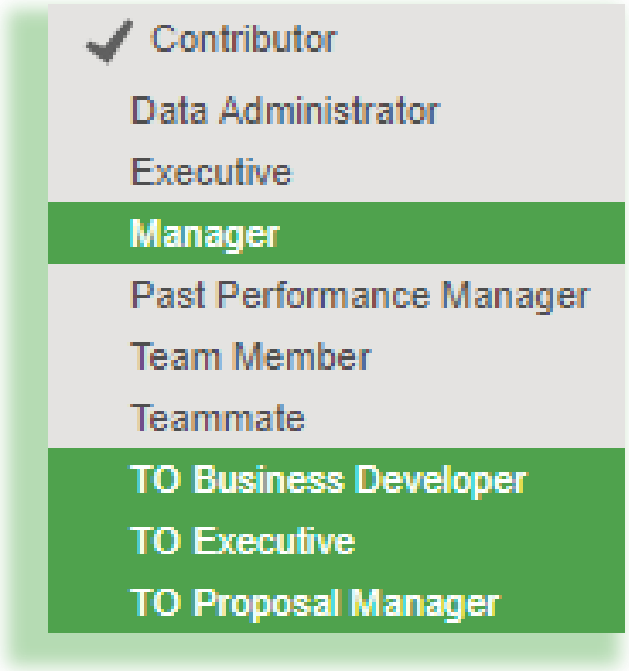
Contributor type – Contributor, Team Member, **OR** anyone with a teammate license.

- No access to reports at all
- Limited to document management functionality.
- Intended for:
    A. Content Writes
    B. Graphic Artists
    C. SME's
    D. External Partners

Permissions: Manager

Manager type – Manager, TO Business Developer, TO Proposal Manager

- Allows access to reports
- Limited to opportunities that User has access to.
- Intended for:
    A. Business Developers
    B. Proposal Managers
    C. Team Leads



Permissions: Executives

Executive/Lead type – More visibility. The Executive type can create and view reports across Organizations and Projects regardless of membership

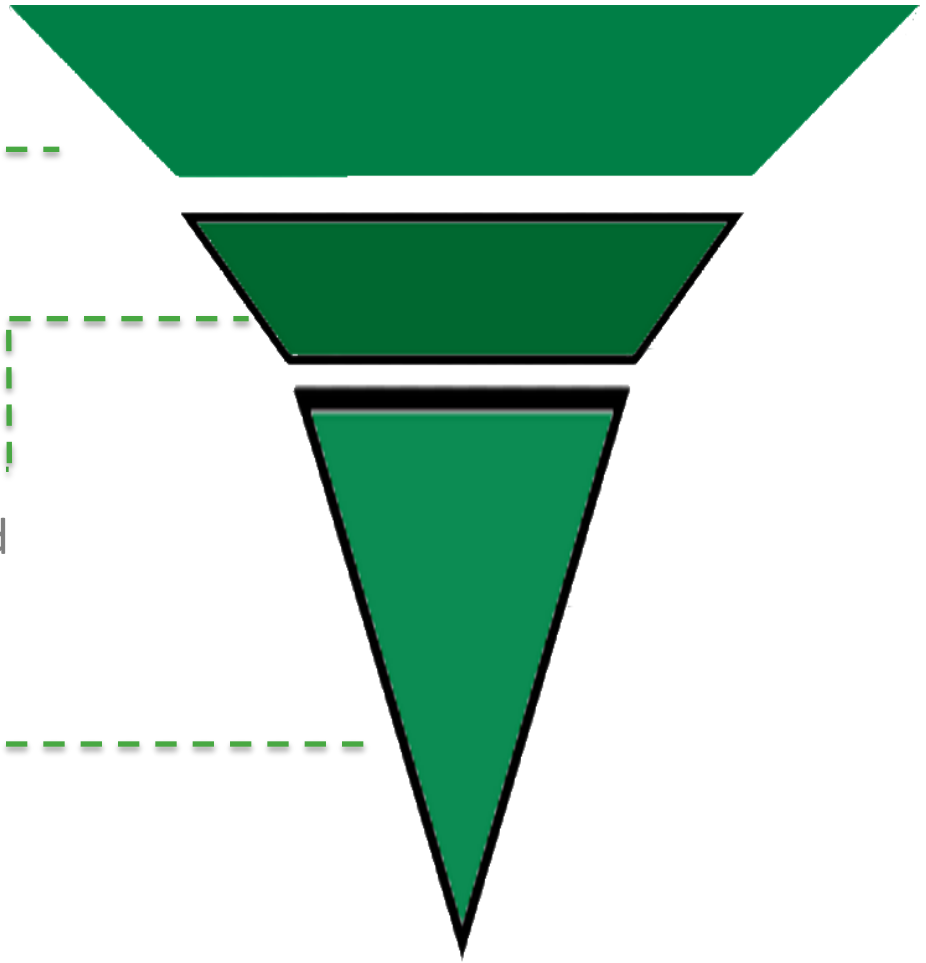
- Allows access to reports
- Can view report data across the entire system.
- Intended for:
    A. Executives
    B. Directors
    C. Proposal Leaders
    D. Heads of Departments
    E. Skilled System Administrators

Permissions: Recap

- **Permissions: Executives:**
  Can Access Reports - with
  Unlimited visibility to all Opportunities
  (even if they are not a member)

- **Permissions: Manager:**
  Can Access Reports - but limited assigned
  projects only

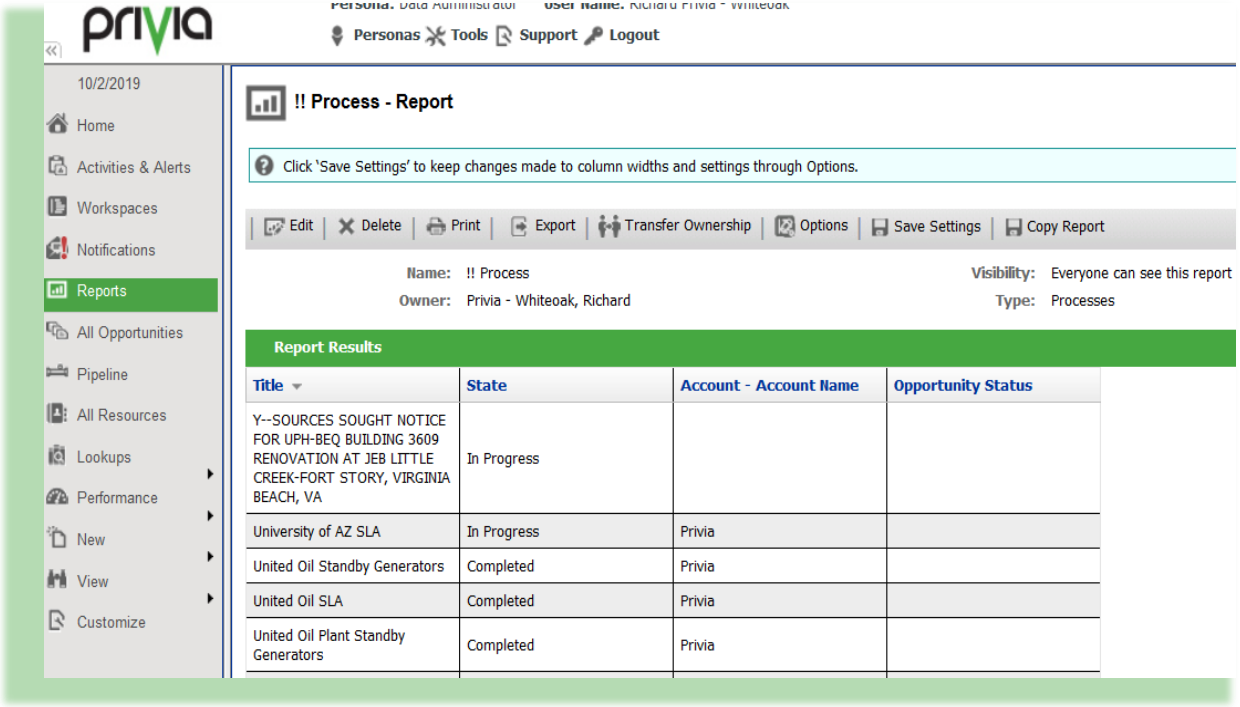
- **Permissions: Contributor:**
  No Access to Reports,
  Content writers, SMEs, External Partners



Four Report Types

Reports are designed to enable greater visibility into the projects and each type of report targets specific data.

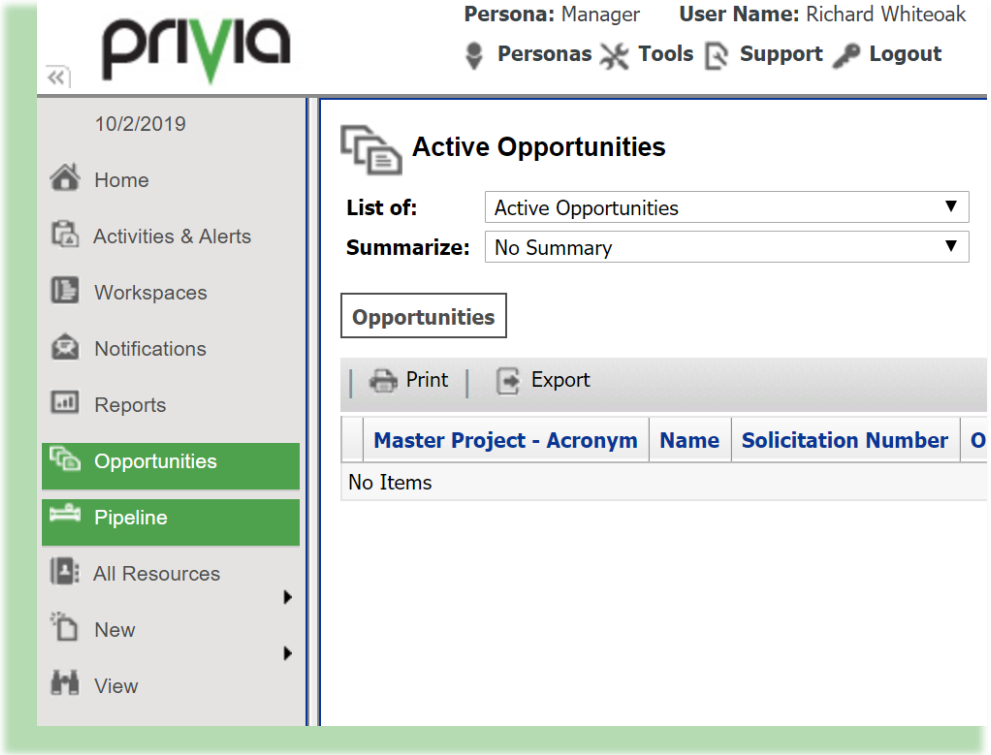
- Opportunity
- Process
- Activity
- Metadata



Opportunity Reports

A preliminary set of data fields are made available for Opportunities in your pipeline. Additional data fields are “unlocked” after an Opportunity is launched.

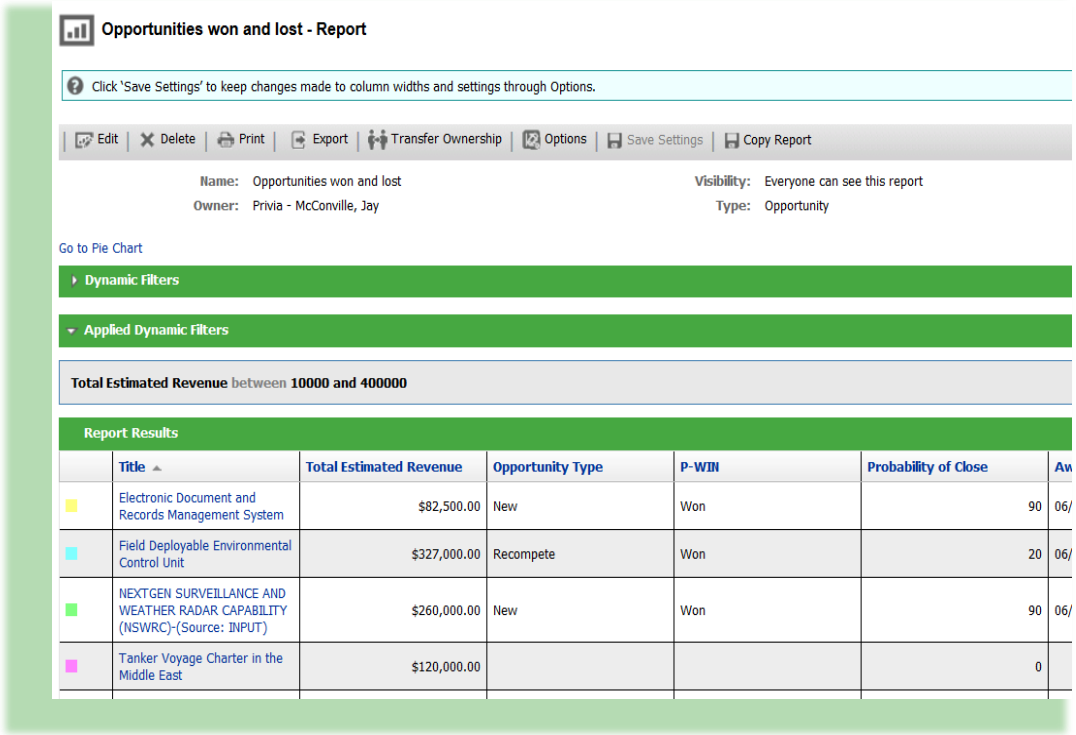
- Opportunity Reports will target the common fields available to both Pipeline and Launched Opportunities.



Process Reports

Process Reports will only target data from Launched Opportunities and combines Opportunity Data Fields and data fields that are specific to the Process

- Launched Opportunities only
- All Launched Opportunity data fields are available
- Most commonly used



Opportunities won and lost - Report

Click 'Save Settings' to keep changes made to column widths and settings through Options.

Edit | Delete | Print | Export | Transfer Ownership | Options | Save Settings | Copy Report

Name: Opportunities won and lost
Owner: Privia - McConville, Jay
Visibility: Everyone can see this report
Type: Opportunity

Go to Pie Chart

Dynamic Filters

Applied Dynamic Filters

Total Estimated Revenue between 10000 and 400000

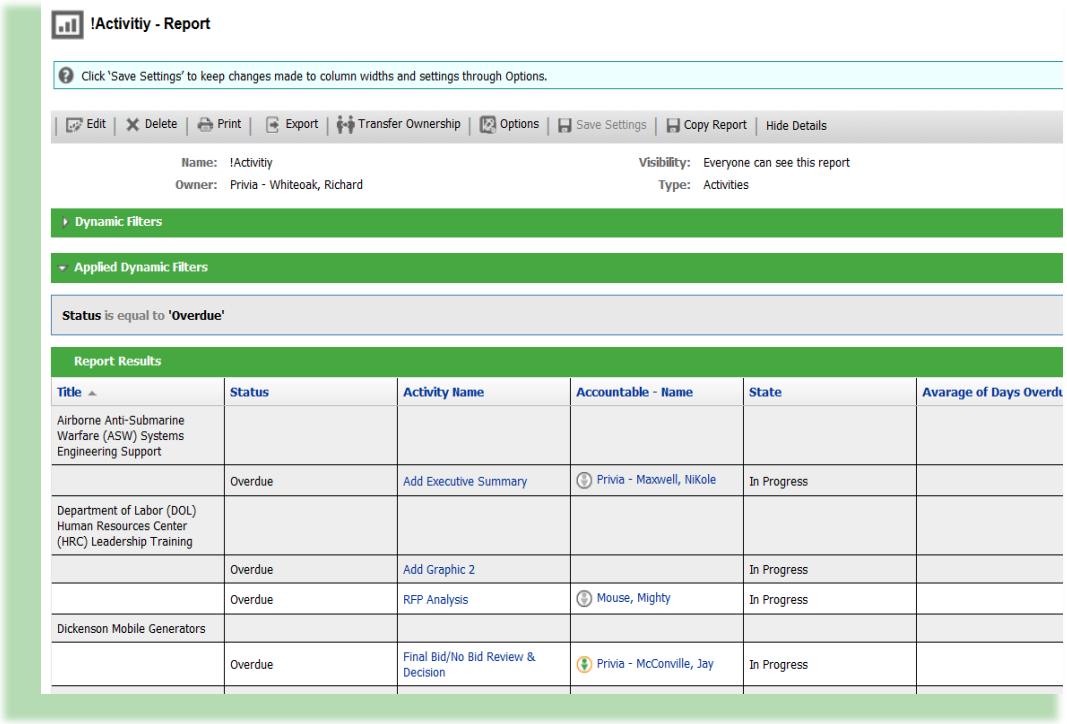
Report Results

Title	Total Estimated Revenue	Opportunity Type	P-WIN	Probability of Close	Aw
Electronic Document and Records Management System	$82,500.00	New	Won	90	06/
Field Deployable Environmental Control Unit	$327,000.00	Recompete	Won	20	06/
NEXTGEN SURVEILLANCE AND WEATHER RADAR CAPABILITY (NSWRC)-(Source: INPUT)	$260,000.00	New	Won	90	06/
Tanker Voyage Charter in the Middle East	$120,000.00			0	

Activity Reports

Activity reports are a hybrid between the Opportunity data, process, and some fields that are specific to tracking activities.

- Used to see trends in user completed tasks
- Track how often projects are overdue/At-Risk



!Activitiy - Report

Click 'Save Settings' to keep changes made to column widths and settings through Options.

Edit | Delete | Print | Export | Transfer Ownership | Options | Save Settings | Copy Report | Hide Details

Name: !Activitiy
Owner: Privia - Whiteoak, Richard
Visibility: Everyone can see this report
Type: Activities

Dynamic Filters

Applied Dynamic Filters

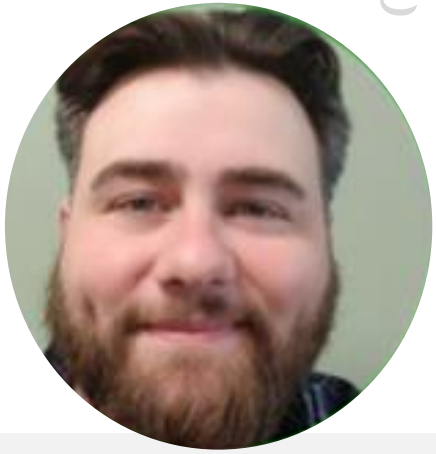
Status is equal to 'Overdue'

Report Results

Title	Status	Activity Name	Accountable - Name	State	Avarage of Days Overdu
Airborne Anti-Submarine Warfare (ASW) Systems Engineering Support					
	Overdue	Add Executive Summary	Privia - Maxwell, NiKole	In Progress	
Department of Labor (DOL) Human Resources Center (HRC) Leadership Training					
	Overdue	Add Graphic 2		In Progress	
	Overdue	RFP Analysis	Mouse, Mighty	In Progress	
Dickenson Mobile Generators					
	Overdue	Final Bid/No Bid Review & Decision	Privia - McConville, Jay	In Progress	

Real-Time Proposal Reporting

Thank you!



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