priVia

2019 User Conference
INFORM. EDUCATE. INSPIRE

Process Automation

NiKole Maxwell
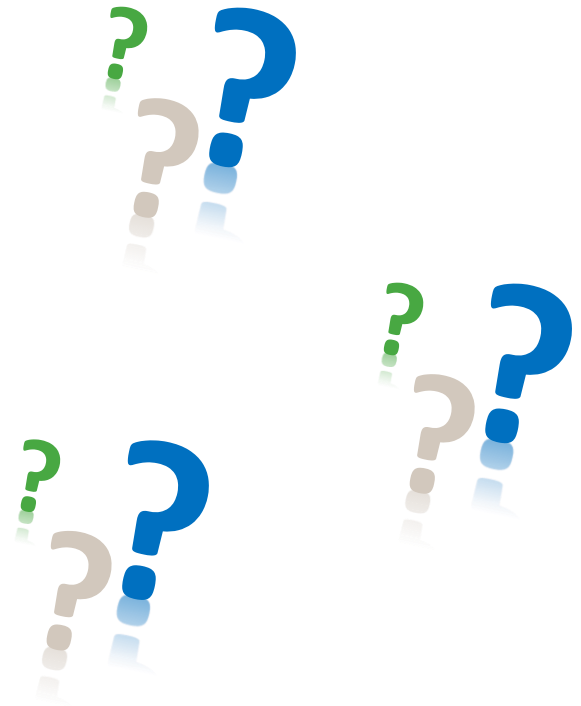Director, Professional Services
Privia

Process Automation

"technology-enabled automation of complex business processes. It can streamline a business for simplicity, increase service quality, improve service delivery or contain costs."

Are you using the tools you already have? ➡️
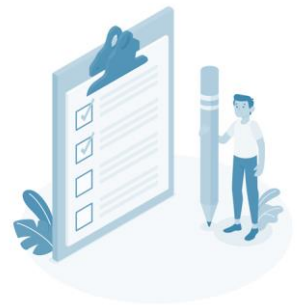
Is Something Missing?

- ☑ Opportunity
- ☑ Team
- ☑ Workspace
- ☑ Collaboration
- ☑ Reporting
- ☐ Workflow

...does Your Work...Flow?

Process Efficiency Check

1. Do you know how long it takes your resources to get to your first color team review?

2. Are you able to identify the amount of time your team took to get to a bid or no bid decision for your last opportunity or loss?

3. Can you quickly tell which of your resources or teammates are available to start a proposal in the 30, 60 or 90 days with no conflicts?

4. Is your proposal process repeatable?

Get to Know…

Privia Process Designer

Activities / Tasks

Track Deliverables

Route For Approval

Resource Assignment

Reusable Templates

Enable your work, collaboration, communication, process to flow.

Simplicity

Keep It Simple

➢ Easy to Use

➢ Enables Participation

➢ Simple Instructions

➢ Reusable

Actualize Cost Savings

Reduce Spend

- **No additional technology purchases**

- **Includes default templates that you can replicate and customize**

Actualize Savings

- **Improved ramp up time**

- **Reduction of repetitive tasks**

- **Improvement of team collaboration (save time, save $)**

Improve Service Delivery

Improves Communication

- Proposal process defined for the team
- Helps with onboarding new teammates and new hires

Removes manual steps

- Tracking opportunities on spreadsheets is a thing of the past
- Eliminates the need for long chains for follow up and task startup

Increases Project Awareness

- Creates visibility into the flow of work
- Adds simple reminders and milestones

Increase Service Quality

Identify Bottlenecks

- Target resource overload
- Track the time allotted for specific tasks
- Reduce repetitive tasks, indefinite loops
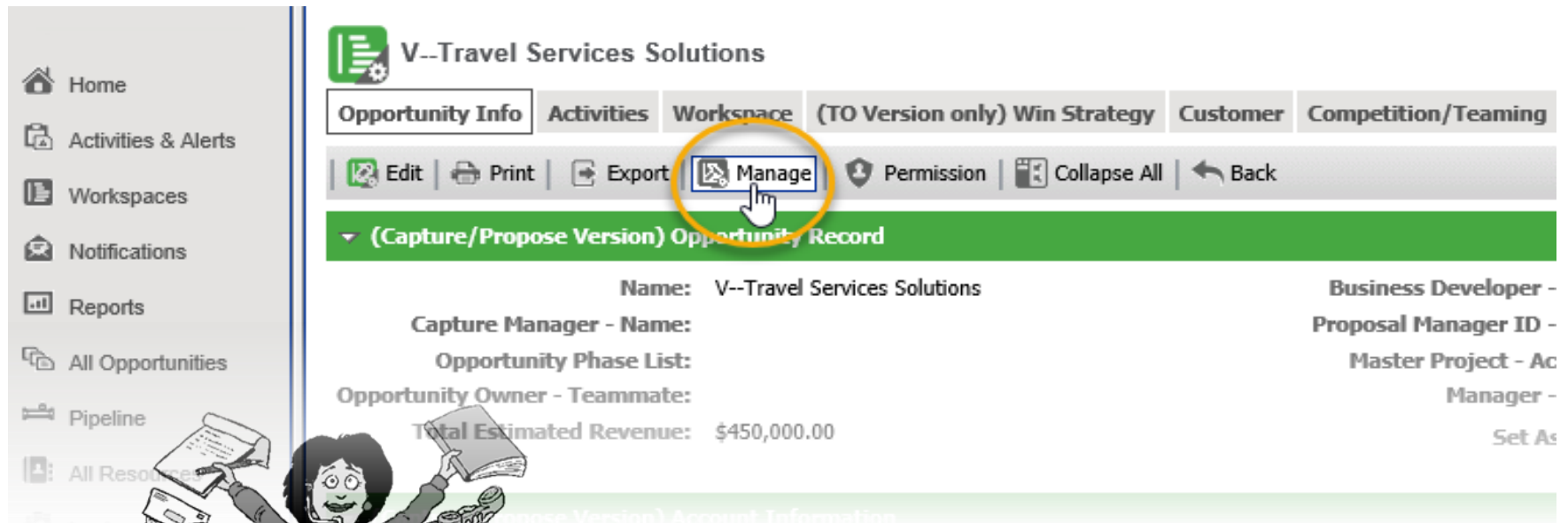
Identify Gaps

- Missing Handoffs
- Missing Approval Steps
- Create smoother transitions

Create Synergy

Workflow Templates + Process Templates + Your Team =

Proposal Synergy

Enables Smart Management

- **Schedule**
- **Process**
- **Ownership**
- **Rollback**
- **Permissions**

Make sure you attend an upcoming training session to learn more!

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Opportunity | Activities

Quick and easy to read proposal activity management

- **What tasks are outstanding?** [quickly view the status of any task]
- **Who is responsible?** [identify accountability and quickly assign resources]
- **What tasks have slipped?** [target opportunity for improvement]

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Persona: Data Administrator   User Name: NiKole Privia - Maxwell
| Personas ✕ Tools ☒ Support 🔑 Logout

C--Architect and Engineering Services AE Multiple Award IDIQ Network Contracting Office 23 - Minnesota and Wisconsin

Opportunity Info | **Activities** | Workspace | (TO Version only) Win Strategy | Customer | Competition/Teaming

| 🖨 Print | ➔ Export

Activity Name	Accountable - Group Name	Accountable - Name	State	Status	Start Date ▲	Finish Date
Initiate Capture-Propose Milestone Process		Privia - Maxwell, NiKole	In Progress	Overdue	11/20/2017	11/24/2017
Conduct Capture Plan Review	Demo Givers	Privia - Maxwell, NiKole	Pending	Normal	07/08/2018	07/14/2018
RFP Analysis	Internal Group	Pricing, Paul	Pending	Normal	07/08/2018	07/08/2018
Final Bid/No Bid Review & Decision			Pending	Normal	07/08/2018	07/08/2018
Proposal Launch Meeting	Demo Givers	Privia - Maxwell, NiKole	Pending	Normal	07/08/2018	07/08/2018
Archive Materials	Demo Givers	Privia - Maxwell, NiKole	Pending	Normal	07/08/2018	07/14/2018
Develop Storyboards and Review (Pink Team)	Internal Group	Pricing, Paul	Pending	Normal	07/08/2018	07/27/2018
No Bid - Close Out the Opportunity	Demo Givers	Privia - Maxwell, NiKole	Pending	Normal	07/14/2018	07/24/2018
Conduct Blue Team Review	Demo Givers	Privia - Maxwell, NiKole	Pending	Normal	07/14/2018	07/19/2018

Home
Activities & Alerts
Workspaces
Notifications
Reports
All Opportunities
Pipeline
All Resources
Lookups
Performance
New
View

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Set Intuitive Alerts

Best Practice: Make an alert meaningful, an indicator of importance, a call to action.
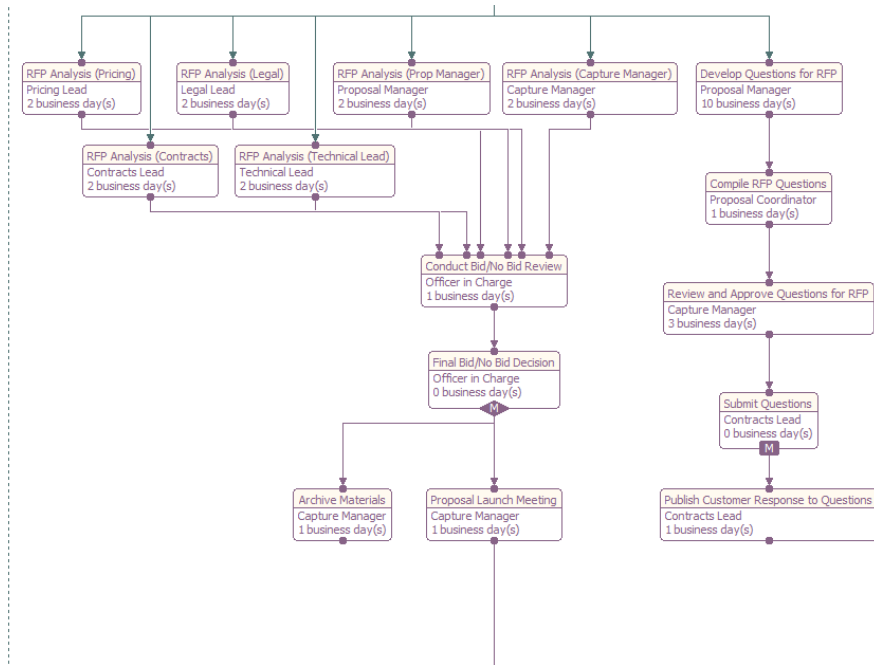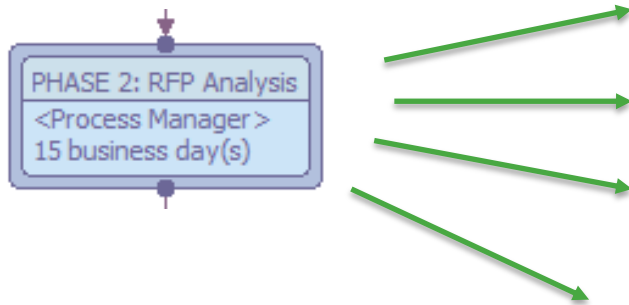
Alerts

- ☐ Send alert when activity state becomes 'In Progress'
- ☐ Send alert when activity state becomes 'Submitted'
- ☐ Send alert when activity state becomes 'Completed'
- ☐ Send alert if activity state becomes 'Completed' before Estimated Finish Date
- ☐ Send alert 1 day(s) before Estimated Finish Date, if activity state is not 'Completed'
- ☑ Send alert on Estimated Finish Date
- ☐ Send alert 1 day(s) after Estimated Finish Date, if activity state is not 'Completed'
- ☑ Send alert when activity Estimated Finish Date is automatically changed
- ☐ Send alert when activity Duration is automatically shrunk

Process Maturity

As your teams use of Privia Matures, fine tune your process, drive to more detailed metrics and watch your process...flow.

Our Approach

Administration

Basic Concepts

Workflow

Propose

Features

Designed to Engage

- Layered Information

- Develop Your Knowledge Base

- Hands On Activities

- Delivered via GoToMeeting*

Hands On Activity

*Other Options Available, if needed

Service Options

➤ **Creating a Simple Workflow I & II**

➤ **Advanced Workflow**

➤ **Custom Workflow Solutions by Privia**

1 Simple Process Design

2 Advanced Workflow

3 Resume Management

4 Rules Automation

5 Clause Library

designed by freepik.com

Subscription Options

Support for your everyday needs

Privia **SILVER**	Privia **GOLD**	Privia **GREEN**
Mid-to-low level proposal activity.	Consistent proposal activity and/or multiple simultaneous proposals throughout the year.	Active proposal centers, large teams, partner coordination, and multiple, simultaneous proposal efforts.
Up to 4 hours/month for Support to Privia Admin, recurring User Training, and Support to Proposal Center Portal implementations.	Up to 10 hours/month for everything Silver provides, Admin Support, User Training, and Portal implementation support, plus consulting.	Up to 20 hours/month for everything Silver and Gold provide, plus product customization or configuration, specialized support for "non-standard" configuration and on-call assistance available on-site.**
$500 per month*	**$1000** per month*	**$2500** per month**

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Privia Professional Services
Here when you need us

Privia can help you better leverage your investment, ease the challenge of resource allocation and reduce the stress of overburdened resources. Whether you're looking to free up resources or augment your team to pursue more opportunities, Privia's Professional Consulting Services provide the insight, expertise and tools you need to maximize your wins. Learn more: www.privia.com/professional-services

Elevate Your Proposals

- **Support Subscription**
- **Advanced Configuration**
- **Additional Training Hours**
- **Train the Trainer Sessions**
- **Salesforce Integration**

Optimize Your Process

- **Resume Manager**
- **Past Performance**
- **Statements of Work**
- **Clause Libraries**
- **Advanced Process**

Augment Your Team

- **Proposal Managers**
- **Volume Leads**
- **Graphic Artists**
- **Technical Editors**
- **Writers and more!**

Thank you!

NiKole Maxwell

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https://privia.com/professional-services