

Deltek®

---

Vantagepoint

Powering Project Success for Consulting Firms





# Deltek Vantagepoint

**Designed from the ground up by consultants for consultants. Deltek Vantagepoint is built on 30 years of project expertise, so you can navigate today's modern workplace and improve client satisfaction.**

Gain up-to-the-minute insights about project progress, resource allocation, and financial performance with a single solution that places your projects and people at its heart. Designed to be used anywhere, anytime and built with consulting industry specific features and an intuitive interface that gives you complete visibility from pursuit to close out. Deltek Vantagepoint is the solution consultants want to use and firms need to use in today's service economy.



## **Project Command Center**

Control all project information in one place – from pursuit and proposal, through project planning and billing, to accounting and financial management.



## **Complete View of Your Business**

Gain visibility across your organization, from engagement initiation to completion. Get actionable insights to make more informed decisions.



## **A More Efficient Way to Work**

Enable teamwork and collaboration via a single tool, and empower users with a simple, intuitive experience.

**What if you could put your  
people and projects at  
the center of your business?**

# Power Engagement Success with Deltek Vantagepoint



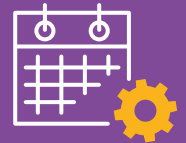
## 1. Pursue Potential Engagement

Find potential engagements sooner to better position your firm to win.



## 2. Create Proposals

Use built-in collaboration tools to track proposal creation tasks and deadlines.



## 3. Schedule Resources

Seamlessly pull all the information gathered during pursuit into a new engagement and easily book resources.



## 4. Manage the Engagement

Streamline transition times from sales to the delivery team and grow your margins with complete visibility.



## 5. Invoice Client and Manage Finances

Improve cash flow and get paid faster with accurate invoices and interactive invoicing tools.



## 6. Measure and Report

Easily pull data about an individual project or assess the performance of your entire portfolio at a glance.



# 1. Pursue Potential Engagement

Gain insight into the status of your bench and backlog, so that you can identify gaps, and increase your win rates. Then, manage your engagements from pursuit to closeout in one place.

With a few clicks, you'll have everything you need to qualify and pursue a potential engagement before the competition has a chance to start a conversation.



Stay in touch with clients and nurture relationships to position your company to win the next big engagement



View target revenue by account, revenue, forecasts, and portfolio health, anytime, anywhere



Be confident you have enough pipeline to meet your revenue goals



Gain insight into staffing and resourcing needs by engagement

Deltek Vantagepoint

Contacts

Brian Thompson

Overview

Activities

Marketing Efforts

Associations

Our Team

Files & Links

Active

Qualified

Status: Qualified

Status Date: 10/20/2018

Owner: Scott

Source: Email

Last Activity: 10/18/2018

DATE

SUBJECT

ATTENDEES

ASSOCIATIONS

11/02/2018

Phone Call

Brian Thompson, Danika Mullenberger

11/02-10/20/2018

Email

Brian Thompson, Danika Mullenberger

Activities

Categories

+ Add Activity

Categories

CATEGORY

There are no records to show in this grid.

+ Add Category

Welcome to the Deltek Personal Assistant. Ask me something!

+ Add contact named Brian Thompson.

+ Creating a Contact with the name Brian Thompson.

+ Creating a phone call activity for you.

Remind me to call Brian on Friday

Remind me to email Brian the meeting details on Friday

Enter a command and press enter!

< Quickly create a contact by saying 'Hey, Deltek!' or typing in a request

< 4 >

# 2. Create Proposals

By drawing on historical client information and engagement details, you can create sophisticated and informed proposals that help you win more engagements. With resource availability at your fingertips, you can create multiple scenarios to find the most profitable mix of resources to meet client demands. And with Deltek Vantagepoint’s intuitive templates, you’ll be able to seamlessly build compelling proposals with ease.



With historical data at your fingertips, create winning quotes and proposals

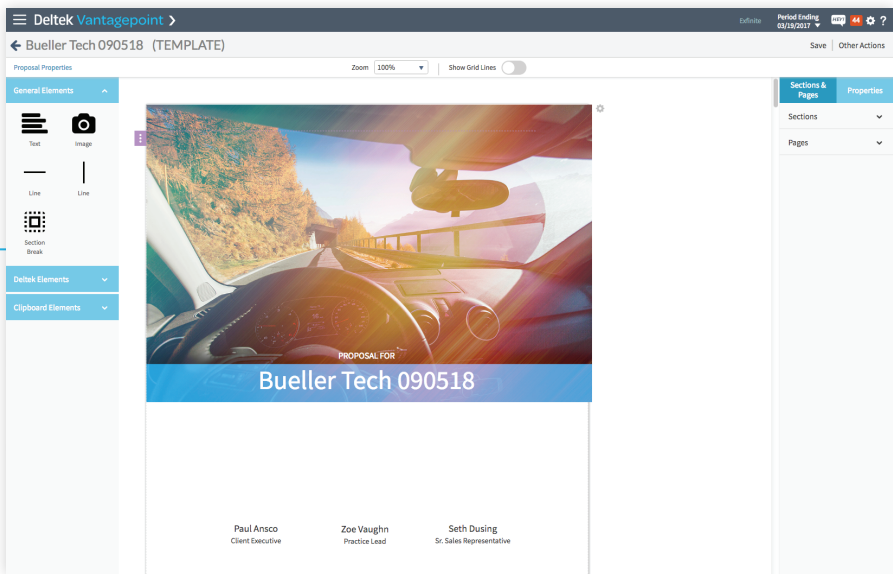


Easily identify over or under-utilized resources and balance the workload



Develop cost scenarios to find the most profitable solution for your engagements

Create amazing proposals with the intuitive, interactive proposal builder >



Deltek enables consulting firms to use information from current projects to help create proposals for future work.



With Deltek, engagement managers have up-to-date information on resources, status and cash flow to make better decisions and increase savings.

### 3. Schedule Resources

Getting the right people scheduled for each project from the start can make it easier to enable success. So, select the right resources with the right skills and capacity for each project and adjust to delight your clients by delivering on time and on budget.



Prepare for new engagements sooner with visibility into future pursuits



Identify gaps in resource schedules to accelerate hiring and onboarding



Manage engagements from pursuit through closeout in one engagement hub, eliminating disconnected information and improving collaboration and efficiency



Collaborate and share information through conversations, tasks, document sharing and calendar items

Deltek Vantagepoint

Plan Active Find engagement 34 of 69 + New Engagement

Livingston Market Analysis

17282.00

Plan last modified 10/06/2018 12:04 AM by ADMIN Plan is checked out to me.

Check Out Save Baseline Publish Other Actions

Scale: Entire Engagement in weeks

Published Show: Billing


Shows Hours

CONTRACT	LABOR	EXPENSES	SUBCONTRACTORS
LEVEL/RESOURCE	ASSIGNMENT START	ASSIGNMENT END	PLANNED HOURS
Livingston Market Analysis	10/08/2018	12/31/2018	926
Research and Design	10/08/2018	11/02/2018	320
Danika Mullenberger	10/08/2018	11/02/2018	160
Sally Kross	10/08/2018	11/02/2018	160
Market Testing	11/05/2018	11/30/2018	480
Danika Mullenberger	11/05/2018	11/30/2018	176
Ryan Lee	11/05/2018	11/30/2018	128
Sally Kross	11/05/2018	11/30/2018	176
Results and Recommendation	12/03/2018	12/31/2018	126
Sally Kross	12/03/2018	12/31/2018	126


Search by skills or availability to easily assign resources to a project

# 4. Manage the Engagement


Set your teams up for success with solid project plans. Alerts and notifications will help your teams stay on track, while collaboration tools ensure that stakeholders have access to the data they need to make proactive decisions anywhere, anytime.




Easily build a profitable engagement plan, including budgets and scheduling



Make it easy for consultants to capture accurate information quickly with simple time sheets

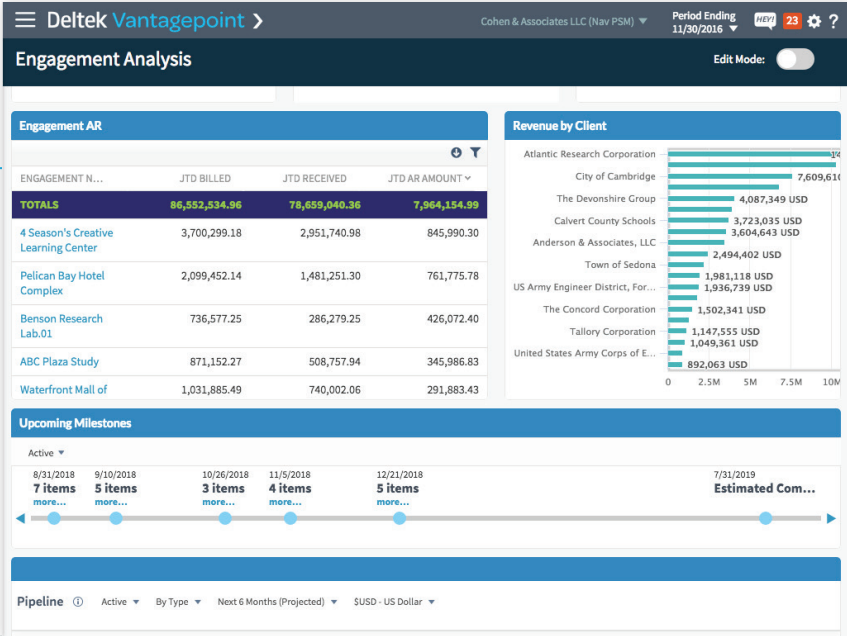


Collaborate by bringing internal and external teams together to deliver great engagements



Provide updates using any device, so you can make real-time decisions about your engagements

See everything you need to know about your engagements in one screen >



# 5. Invoice Clients and Manage Financials

Your firm needs to get paid for the work you deliver, so give your consultants a tool they will want to use to capture time and expenses. Then empower project managers to quickly edit invoices electronically and monitor payment status to expedite invoicing and most importantly, improve cash flow.



Generate invoices that are accurate and timely the first time, every time



Utilize dashboards and alerts to keep the data you need most at your fingertips



Gain company-wide visibility by monitoring key performance indicators, such as, utilization, project margins, average hourly rates, and more



Monitor payment status to ensure positive cash flow with precision and control

The screenshot displays the Deltak Vantagepoint software interface. The main window is titled 'Interactive Billing' and shows details for 'Livingston Market Analysis'. A modal window titled 'Invoice Accept' is open, displaying a table of invoice items. The table has columns for PHASE, ACCOUNT, INVOICE SECTION, and AMOUNT. The items are categorized by PHASE (001, 002) and ACCOUNT (401.00, 402.00). The total amount for the invoice is \$82,830.00. The interface also shows a sidebar with navigation options like 'MY STUFF', 'HUBS', 'RESOURCE MANAGEMENT', 'PROPOSALS', and 'BILLING'. The 'BILLING' section is currently selected, showing options like 'Interactive Billing', 'Batch Billing', and 'Billing Groups'.

PHASE	ACCOUNT	INVOICE SECTION	AMOUNT
001	401.00	Fee	35,000.00
001	401.00	Labor	47,830.00
001	421.00	Subcontractor	0.00
001	422.00	Expense	0.00
001	422.00	Unit	0.00
001	401.00	Add-on	0.00
001		Interest	0.00
002	401.00	Fee	0.00
002	401.00	Labor	0.00
			<b>82,830.00</b>

Accept Cancel

< View invoice details within the engagement

# 6. Measure and Report

Spend less time running historical reports. Instead, monitor the health of your business in real-time with a single source of truth. With complete visibility into every aspect of your business, you can make better, faster, more informed decisions.



Easily identify the clients that are more (and less) profitable

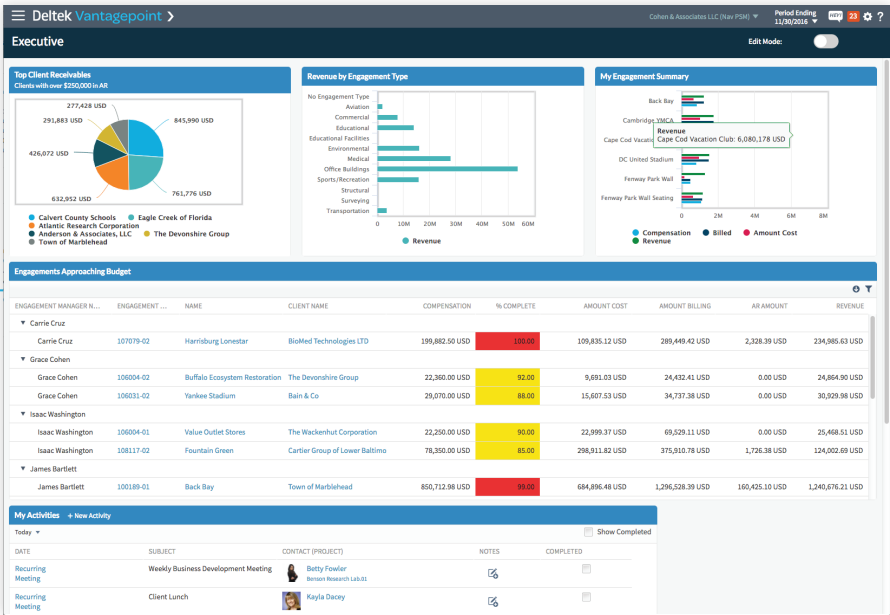


Measure client engagement performance by team, engagement, client or firm-wide



Spend less time running reports and more time making the right decisions for your business

Actionable insight for every aspect of your business in one place >





Deltek Vantagepoint: Built for the way consulting firms work. Better software means better projects.

**[www.deltek.com/vantagepoint](http://www.deltek.com/vantagepoint)**

---

Better software means better projects. Deltek is the leading global provider of enterprise software and information solutions for project-based businesses. More than 23,000 organizations and millions of users in over 80 countries around the world rely on Deltek for superior levels of project intelligence, management and collaboration. Our industry-focused expertise powers project success by helping firms achieve performance that maximizes productivity and revenue. **[www.deltek.com](http://www.deltek.com)**

**US & Canada** 800.456.2009 **UK** +44 (0) 20 7518 5010 **EMEA** + 45 70 20 33 18 **APAC/AUNZ** +61 2 9911 7740

© Deltek, Inc. • All Rights Reserved • All referenced trademarks are the property of their respective owners. Pricing subject to change without notice. REV-010319\_10843