



# Deltek Vision<sup>®</sup>

for Public Relations and  
Marketing Communication Agencies



[www.deltek.com/vision](http://www.deltek.com/vision)

# DELTEK VISION

## A HIGHER LEVEL OF INTEGRATION, COLLABORATION AND SUCCESS

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Managing the profitability of an agency requires instant visibility into your talent, clients and jobs from anywhere at anytime. Deltek Vision® brings unparalleled focus to the challenges that make agencies unique. This is a revolutionary end-to-end software solution designed specifically for organizations whose people are their biggest asset.

Deltek Vision supports the complete client lifecycle to help you manage and measure all of your critical business functions. Thousands of organizations, ranging in size from 10 employees to global enterprises, rely on Deltek every day to win more business, execute jobs and improve performance. Vision users commonly experience measurable benefits, such as improved employee utilization, streamlined job management and improved profitability.



## WIN MORE BUSINESS...of the right kind

### MANAGE COMPLEX CLIENT ACCOUNT STRUCTURES

- Manage clients, contacts, opportunities and activities based on a client's organizational structure
- Integrate with Microsoft® Outlook to share contacts, activities and calendar events

### GET A TRUE READ ON PIPELINE AND BACKLOG

- Track opportunities from a lead to a job
- Forecast jobs accurately and manage future staffing requirements

### ESTIMATE SERVICE COSTS UPFRONT

- Record time and accurately price each job at the proposal stage
- Measure the cost to win business

## EXECUTE JOBS...with the right mix of people and planning

### FREE-UP CREATIVE TALENT TO FOCUS ON CLIENT WORK

- Receive an email alert and enter time and expense from any location
- Use automated approval workflow to improve payment time
- Easily view all assigned jobs, access past jobs and collaborate with co-workers

### SIMPLIFY ACCOUNT MANAGEMENT

- Leverage workflows to streamline job initiation, budget planning and invoicing
- Proactively reduce job risk through real-time reports and key performance indicators
- Accurately capture all job-related costs, correctly invoice customers the first time and reduce DSO
- Easily create multiple invoice templates to meet client requirements

### PLAN AND TRACK JOBS FROM A RESOURCE PERSPECTIVE

- Easily view your current resource capacity against job demands to improve utilization rates
- Obtain accurate views of forecasted opportunities and make sound decisions on future staffing needs
- Keep-up with changing client needs and simply adjust your job bookings
- Share resources across multiple business units

## IMPROVE PERFORMANCE...with accurate measurement

### TRACK SUCCESS BASED ON CLIENT AND BUSINESS STRUCTURE

- Generate consolidated reports based on client, business unit or brand/product
- Drill-down from any report into the actual transactional data
- Distribute costs accurately with Vision's inter-company billing

### ACCESS BUDGET, ACTUAL AND COMMITTED AMOUNTS EASILY

- Manage each job with up-to-date estimates at completion vs. budget reports
- Receive notifications when key budget thresholds are reached and avoid budget overruns
- View all work in process (WIP) for each job

### CUSTOMIZE DASHBOARDS FOR PERSONALIZED CONTENT

- A graphical entry point to your company's data that configures a single Web page with real-time information
- Provide key decision makers with secure, role-based metrics tailored to their specific business requirements
- Access real time metrics that offer visibility into all areas of the organization, plus the capability to drill-down to more detailed information
- Display live reports, key financial indicators and alerts

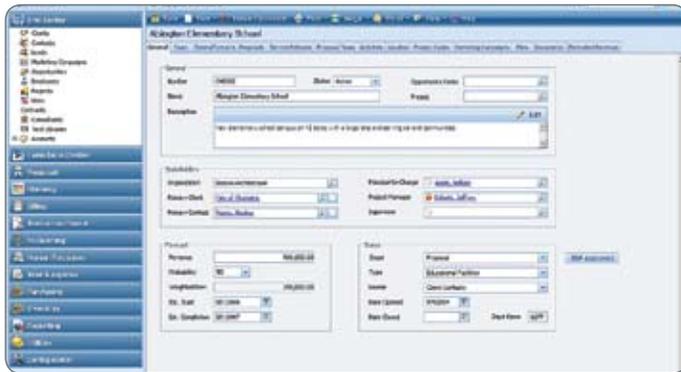
# WIN MORE BUSINESS

## MANAGE THE ENTIRE CLIENT AND OPPORTUNITY LIFECYCLE

Vision Customer Relationship Management (CRM) automates the entire opportunity-to-execution cycle by providing all of the tools you need to win new business and strengthen your existing client relationships. Vision CRM automates your client and contact management, opportunity tracking, marketing campaign management, business development and activity management, and can be integrated with Microsoft® Outlook to facilitate collaboration throughout your organization. With a single central source of information accessible to everyone, you will empower your team to fully leverage their collective knowledge.

## ENCOURAGE INFORMATION SHARING

Achieve effective collaboration, no matter where your team members are located. Vision Document Management fosters information-sharing by providing a single, web-based document collaboration platform for your team to share. Within Vision, team members from around the world can upload, share, review and edit documents by using a web browser. Vision enables each document to be associated with clients, jobs, employees and opportunities—providing a total knowledge management solution.



**Figure 1:** Providing employees with a single view of your current and potential clients ensures that you are leveraging all interactions to win more business.

## EXCEED CUSTOMER EXPECTATIONS WITH TARGETED, ATTRACTIVE PROPOSALS

Empower your marketing and sales teams to efficiently produce custom proposals that stand out from the competition. Ensure your proposals contain the most recent and relevant information by giving employees access to a central source of company boilerplates, metrics and more. Integration with Microsoft Word and desktop publishing systems ensures that proposals are delivered in a graphical style that reflects your agency's brand. With Vision Proposal Automation, you are focused on perfecting a winning image rather than spending valuable time searching through dated and irrelevant material.



**Figure 2:** The Deltek Vision Dashboard brings together critical business information all in one place.

# EXECUTE JOBS

## ENTER TIME & EXPENSES ANYWHERE, ANYTIME

Speed-up and increase the accuracy of your time collection process through an intuitive interface that is always accessible to employees. Integrated with Vision Billing, Resource and Job Management and Customer Relationship Management modules, Vision Time & Expense provides real-time visibility into costs that impact your clients, jobs and profitability. Ensure that hours and expenses are immediately accessible throughout the system and eliminate redundant data entry that leads to errors and omissions. With Vision Time & Expense, you give managers a true picture of job labor hours and quickly invoice customers for improved cash flow.

The Vision Mobile Applications Suite allows your employees the convenience of accessing certain Vision features on their handheld devices. It allows the entry of time and expense data and access to Vision CRM's contacts, activities and opportunities. It even accommodates the entry of time and expenses from disconnected PCs for upload to Vision when an internet or LAN connection is available—a great feature for employees traveling without internet connectivity.



**Figure 3:** With easy access from anywhere, anytime, Vision Time & Expense Entry helps you capture time and expenses quickly, which minimizes time and expense leakage, provides managers with more timely job cost information, improves cash flow and improves your bottom line.

“Vision allowed us to convert 12 years of data from three legacy systems and customize interfaces and reports, all on a tight three-month schedule.”

- Chadwick Martin Bailey



“Vision truly helps us maximize our monthly cash flow, helping our business thrive as we grow.”

- Fullhouse Media

## EXECUTE JOBS

### MANAGE YOUR AGENCY'S ENTIRE REQUISITION, PURCHASING, RECEIVING AND INVENTORY CYCLE

Vision Purchasing manages your agency's entire purchasing cycle—whether it's simple or sophisticated—while maintaining integration with Financial and Job Accounting and Resource and Job Management modules. It supports the creation and tracking of purchase orders for materials, supplies, capital items and services for both job-related and in-house needs. And, by using Vision's built-in workflow and approval features, all purchases can be tracked accurately and efficiently.

For Vision customers that also provide products, Vision Purchasing includes a feature set for managing inventory. It will track inventory by location, calculate average product cost and automatically create a purchase order when quantities reach a specified level. When an inventory item is sold, it automates the assignment of units, customer charge and cost to the job.

### DRAMATICALLY IMPROVE CASH FLOW

Ensure your invoices are accurate and in-line with your client's expectations, get them out the door on-time and get paid faster! Vision Billing supports complex and diverse billing requirements, including time and materials, fixed-fee, retainer, percent-to-complete and more. Automatically capture every billable labor and expense transaction, apply rate tables, enable employee overrides, calculate fees, handle multiple currencies, generate draft and final invoices using the templates and formats of your choice and manage write-offs and adjustments.

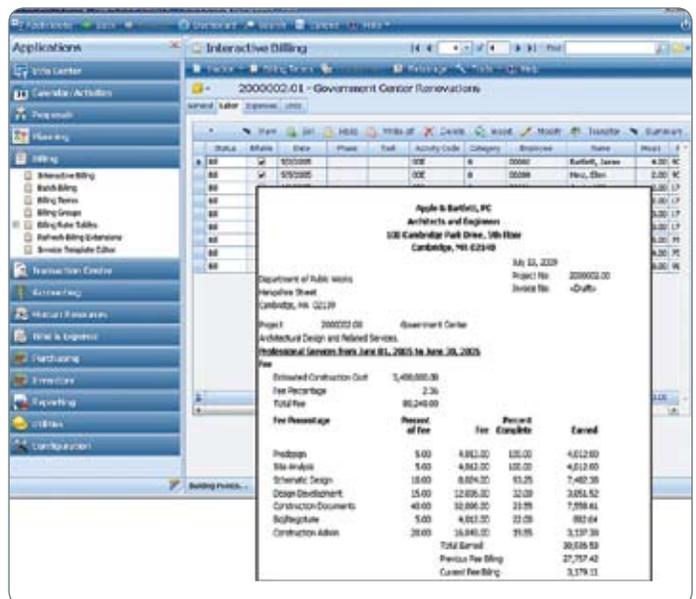


Figure 6: With the flexibility to bill customers based on unique rate structures, you can get invoices out the door quickly and accurately—improving cash flow and client satisfaction.

## MAXIMIZE UTILIZATION AND STREAMLINE JOB CYCLES

With Vision Resource Planning, you can combine past-job and future planning data to proactively manage the results of your jobs. It will help your managers complete jobs on time and on budget, while maintaining high levels of utilization. The result is improved job performance and a stronger bottom line.

Vision Resource Planning automates job planning, resource scheduling and resource utilization. And, because it is fully integrated into Vision, all timesheet and expense data are automatically fed into each job plan, providing your managers with up-to-the-minute detail to ensure everything stays on track.

## SUPPORT FOR MULTIPLE CURRENCIES

The Vision Multicurrency module allows you to complete business transactions in any number of global currencies, while maintaining core financial records in a single “functional currency.” It is designed to meet the accounting, job control, planning, resource management and CRM needs of any enterprise that uses multiple currencies—from a complex global enterprise that has daily transactions, to a single company that occasionally does business in foreign currencies.

## FULFILL PAYROLL PROCESSES INTERNALLY OR EXTERNALLY

Vision Payroll simplifies every aspect of the payroll process. It increases accuracy, provides flexible payroll processing, generates automatic payroll runs and provides a full range of detailed reports. Payroll, when integrated with the other Vision modules, provides smooth and accurate information flows throughout the financial management system. If you’re not ready to take on the payroll process, you can export Vision directly to ADP® or Paychex® for processing.

## GAIN UNPRECEDENTED INSIGHT INTO COMPANY-WIDE PERFORMANCE

Managing financial performance by job is critical for today’s agencies. Deltek Vision integrates job costing and control with the general ledger so you can track profitability in real-time and identify problems as they arise. Vision Accounting includes a complete set of business finance tools, including general ledger, accounts payable, accounts receivable, purchasing with inventory, revenue recognition, overhead allocation, multi-company/multi-currency support and job and financial reporting. Vision Accounting is seamlessly integrated with all Vision modules, ensuring that costs are shared automatically, while maintaining a comprehensive audit trail.

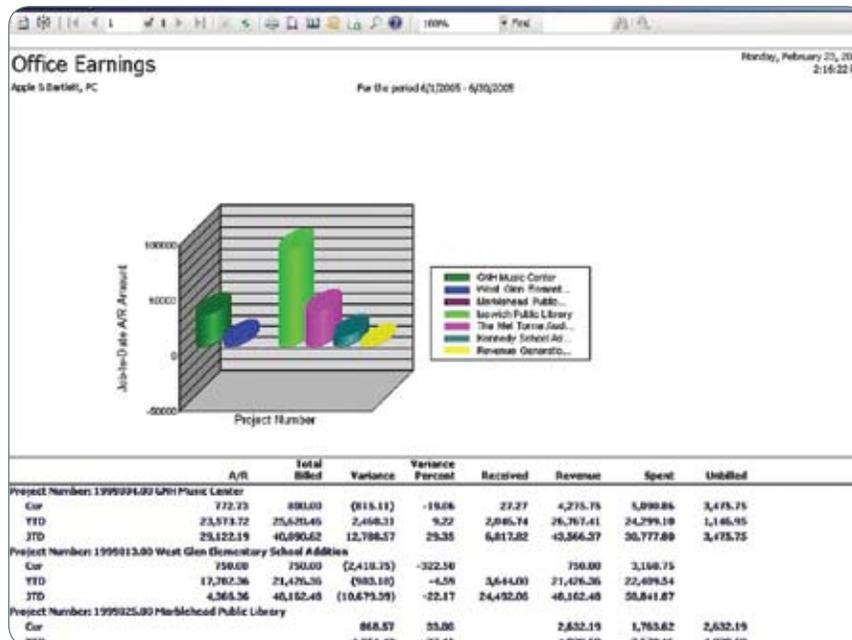


Figure 4: Financial and Project Accounting Reports give insight into agency-wide performance.

"Deltek Vision tracks, analyzes and manages all of our project information in a way that makes sense for all of us."

- Automation Creations, Inc.

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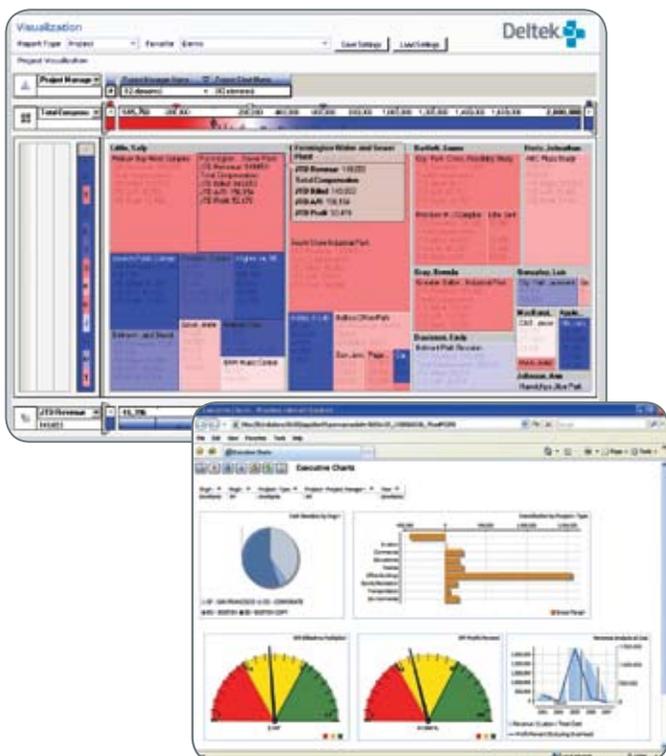


# IMPROVE PERFORMANCE

## VISION PERFORMANCE MANAGEMENT

Agencies that thrive have an accurate view of their costs, profit, revenue, as well as visibility into trends that require timely corrective action. With Vision Performance Management (VPM), executives and key decision makers have flexible dashboards with point-and-click, multi-level metric filters and transaction-level drill-down capability to make timely business decisions. It also allows your managers to quickly identify issues that require attention and attend to them in order of greatest importance—in substantially less time than reviewing reams of paper reports.

Through a combination of shapes and colors representing job-related metrics and risks, Vision Performance Management provides a single, interactive snapshot into the health of your agency. Trends and risks can be analyzed quickly by drilling-down to underlying data to determine an appropriate course of action, improving your business performance.



## TAILOR REPORTS TO MEET YOUR UNIQUE NEEDS

Access and analyze Vision data—from key financial metrics and job analysis, to opportunity tracking and resource utilization—tailoring each report to meet your specific needs. Vision’s reporting system includes more than 350 standard reports that range from simple to sophisticated. Whether you are preparing a basic report or an elaborate one, this flexible reporting model puts key information at your fingertips.

## EMPOWER USERS WITH FLEXIBLE, EASY-TO-USE REPORTS

Vision’s award-winning reporting system gives you an accurate, up-to-the-minute portrait of everything from a job’s status to the agency’s overall performance. Firms of all sizes benefit from a wide variety of formatting options, and users can create effective and graphically-appealing reports. The flexible reporting framework makes it easy to configure, preview, print and e-mail reports. And with Vision’s extensive report drill-down capability, you can get to the details of underlying data quickly and easily.

Project Summary		For the period 6/1/2005 - 6/30/2005			
Apple & Bardett, PC		Current Hours	Current Billing	JTD Hours	JTD Billing
Project Number: 800001.00 General Overhead					
Phase Number: 000 Corporate Unassigned					
Labor		8.00		66.00	
Indirect Exp.			66,312.00	66.00	78,468.75
Total fee 000		8.00	66,312.00	66.00	78,468.75
Phase Number: 100 Boston Unassigned					
Indirect Exp.			925.00		925.00
Total fee 100			925.00		925.00
Phase Number: 1AR Boston Architectural					
Labor		10.00	224.00	43.00	1,128.00
Indirect Exp.			15,845.00		19,539.00
Total fee 1AR		10.00	16,069.00	43.00	20,667.00
Phase Number: 1EN Boston Engineering					
Labor				4.00	250.00
Indirect Exp.			18,215.00		18,215.00
Total fee 1EN			18,215.00	4.00	18,475.00
Phase Number: 11N Boston Interiors					
Labor				7.00	512.00
Indirect Exp.					
Total fee 11N				7.00	512.00
Phase Number: 200 San Francisco Unassigned					

Figure 4: Financial and Project Accounting Reports give insight into agency-wide performance.

# DELTEK VISION: TECHNOLOGY THAT MAKES A DIFFERENCE

## ANYWHERE, ANYTIME ACCESS

Vision employs 100% browser-based technology, which makes it possible to access information from anywhere, anytime.

## MORE EFFICIENT SYSTEM MAINTENANCE

Other than a web browser, the computer that will be accessing Vision does not need any special software—no ActiveX® controls, plug-ins, applets or proprietary controls—and does not require set-up on individual workstations. Just install or update Vision software on your servers, and it is automatically available to all users.

## EXTEND VISION'S CAPABILITIES

The Deltek VisionXtend® platform gives you the power to develop real-time, transparent connections between Vision and other applications. Its feature-set:

- Allows you to access outside web services directly from the Vision user interface
- Implements data validation routines specific to your firm's needs
- Allows you to establish workflow features that keep key processes moving forward
- Delivers more personal, integrated experiences to users via the new breed of smart devices
- Synchronizes with Microsoft Outlook

Vision's leverages standard internet protocols, including XML and SOA, shared by otherwise diverse applications and devices.

## THE POWER OF WORKFLOWS

Think of the complexity of some of your agency's business processes. Those that have numerous steps, require coordination between multiple departments or offices and span days, weeks or months. Each step of the way, the opportunity to make costly mistakes exists.

The Vision Workflow engine keeps processes on track, automates time-consuming manual tasks and keeps players informed and involved. The payoff is lower operational costs, greater agility and quicker response to your needs.





## RELY ON THE LEADING SOFTWARE SOLUTIONS FOR PROJECT-DRIVEN BUSINESSES

Deltek (NASDAQ: PROJ) is the leading provider of enterprise applications software designed specifically for project-focused businesses. For more than two decades, our software applications have enabled organizations to automate mission-critical business processes around the engagement, execution and delivery of projects. More than 12,000 customers worldwide rely on Deltek to measure business results, optimize performance, streamline operations and win new business.



The Fitzgerald Group is a Deltek Partner and has the knowledge and experience to help you attain greater levels of profitability and success by maximizing the benefits of your Deltek Vision system. Just as importantly, we specialize in helping professional service organizations identify process improvements that positively impact both project and firm profitability. Our experienced consultants are not technicians, but rather professionals from a wide range of backgrounds, who know how to think creatively and understand how your business works.

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