

Deltek Vision[®] CRM eLearning

Fully Leverage Your Vision CRM Investment with Comprehensive eLearning

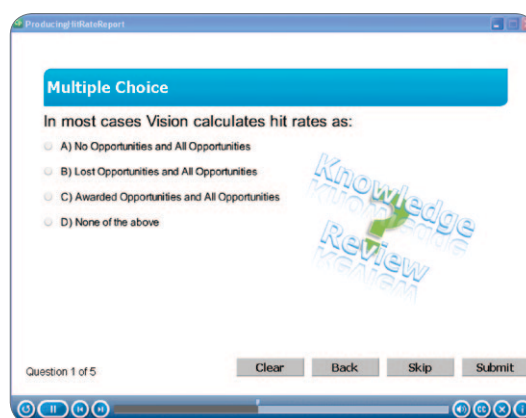
BENEFITS FOR THE END-USER:

- Utilize just-in-time training
- Learn anytime, anywhere and at your own pace
- Align training to employee needs
- Monitor understanding with review questions and scoring

Recent economic and competitive pressures have called for a reassessment of business development processes. Vision CRM brings together all of your marketing intelligence into a single integrated system, eliminating redundancy throughout your organization.

In order to leverage Vision CRM's comprehensive tools and processes, education is essential. With Vision CRM eLearning modules, employees can access eLearning from home, office, or on-the-road. With travel, hotel, and meal costs removed from your budget, you significantly increase the value of your training dollar.

Vision eLearning is an all-inclusive training solution – from marketing campaigns through contract award.



Vision CRM eLearning features knowledge review questions with scoring to monitor understanding.

INTRODUCTION TO VISION CRM eLEARNING

The Introduction to Vision CRM module enables users to identify the scope of Vision CRM and the CRM Business Process Flow. We introduce Vision CRM Info Centers, the Calendar/Activities application for activity management, CRM reports to gauge business, and the dashboard, which allows users to create a personalized view of their business world.

- Define CRM
- Identify the scope of Vision CRM
- Identify elements of the Vision CRM Business Process Flow
- Identify CRM-related areas within Vision

CLIENT MANAGEMENT eLEARNING

In the Client Management module, you will become acquainted with the Client Info Center and its relevant areas for client management within the CRM Business Process Flow. Learn to represent client and vendor relationships with the creation of client hierarchies. In the Client Info Center, create new clients and update existing ones.

- Gain an overview of client management within Vision and the CRM Business Process Flow
- Update and create new client records
- Utilize Client Hierarchy relationships



Contact Deltek

www.deltek.com
info@deltek.com
800.456.2009

Deltek (NASDAQ: PROJ) is the leading provider of enterprise applications software and solutions 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.

CONTACT MANAGEMENT eLEARNING

The Contact Management module provides an overview of contact management and how it fits within the overall CRM Business Process Flow. This segment covers maintaining the Contact Info Center, including entering new contacts and related activities to facilitate accurate, up-to-date contact records.

- Enter a new contact record
- Record activity for a contact
- Understand the contact record categories

OPPORTUNITY TRACKING eLEARNING

In the Opportunity Tracking module, you will become acquainted with important aspects for maintaining an accurate representation of your opportunity pipeline. Learn to add a new opportunity in the Opportunity Info Center, update stages and probability for an existing opportunity, and produce an Opportunity List Report to gauge stages of potential business.

- Add a new opportunity record
- Update opportunity stages and probability
- Produce the Opportunity List Report grouped by stage

LEAD, MARKETING, AND MARKETING CAMPAIGN MANAGEMENT eLEARNING

In the Lead, Marketing, and Marketing Campaign Management module, you will review important aspects for maintaining and creating leads. Convert existing leads into clients and set up new leads within the Leads Info Center. Learn to create marketing campaigns and monitor progress with the Marketing Campaign Summary report.

- Enter a new lead record
- Convert a new lead into a client
- Create a new Marketing Campaign
- Print a Marketing Campaign Summary Report

SCHEDULE AND ACTIVITY MANAGEMENT eLEARNING

The Schedule and Activity Management module focuses on the creation and management of activities that support your CRM practices. In this module, you'll learn to schedule an activity using the Activity Manager, Info Centers, Calendar, and Dashboard. The activity filter enables you to control details viewed regarding activities and print a representative Activity List Report. Learn to share activities with select contacts and attendees, and add upcoming activities.

- Share an activity with attendees and contacts
- Schedule recurring activities
- Use the activity filter
- Print an Activity List Report
- Create follow-up activities

Visit Deltek University's website or
email us at deltekuniversity@deltek.com

To contact an education representative,
please call 800.456.2009 x3