



# CRM LITE FOR DELTEK VANTAGEPOINT®

By AMR Consulting



- 1 Contacts don't only have to be for existing Clients & Projects. Store Lead data in a separate tab in the Contacts Hub
- 2 Add new fields to help assess Lead value and track progress with relationship development
- 3 Use Opportunity data fields to create a pipeline of possible new work

**Contacts** | Active | Find contact | 5 of 100+ | + New

**Alfred Fowler**  
Vice President  
Last modified 12/6/2021 08:40 pm by William Berry

**LEAD DATA**

<b>Source</b>	<b>Title</b>	<b>Professional Designation</b>
Referral	VP of Engineering	P.Eng
<b>Firm Name</b>	<b>Firm Type</b>	<b>Firm Size</b>
MMM Group	Civil Eng	Large
<b>Phone No.</b>	<b>Email Address</b>	<input checked="" type="checkbox"/> Connected on LinkedIn
877-888-9999	afowler@mmm.co	

**Activity History**

DATE	TYPE	NOTES	ENTERED BY
12/9/2021	Virtual Meeting	Good discussion about	Abby Collins
11/6/2021	Phone Call	Intro call with Alfred. F.	Abby Collins

+ Add Activity History

**Opportunity Data**

<b>Pipeline Stage</b>	<b>Opportunity Description</b>	<b>Opportunity Size</b>
Qualifying	Will be invited to bid on a new bridge construction project.	\$1,000,000.00
<b>Win Probability</b>	<b>Probability Justification</b>	<b>Owned By</b>
45%	Excellent match to our skill sets.	Abby Collins

Look beyond the projects currently underway, become better financial and resource planners, and start building a future business pipeline.

**Projects** | All | Find project | 5 of 50+ | + New

**4 Season's Creative Learning Center**  
030322501  
Last modified 8/10/2021 11:54 pm by William Berry

**GO/NO GO ANALYSIS**

**Opportunity Information**

Date RFQ/RFP Received	Strategy meeting proposed for:	Date Evaluation Completed
10/4/2021	10/7/2021	10/15/2021
Date RFQ/RFP Due	Is the project in a geographical area we want to pursue?	Evaluation Completed By:
11/30/2021	Yes	Abby Collins
Do we know the selection committee?	What magnitude of Profit make on the Project?	Final Evaluation Score %
Yes	3-Med	75

**Competition**

Do we know our Competition?	Has another consultant done preliminary work on this project?
None	None

**Team Information**

Does our experience closely match the needs of the project?	Do we have the team members available for this project?	Is our workload capacity compatible with project requirements?
None	None	None

**Client Information**

Is this an existing, former, or new client?	Has prior work for this client been profitable?	Is this client targeted in our Strategic Plan?
None	None	None
How well does this client know us?	Does this client pay bills promptly?	How much of this type work have we done?
None	None	None

- 4 Add a new tab in the Project Hub for Business Development analytics
- 5 Develop categories and criteria for supporting pursuit decisions
- 6 Set a minimum score level for pursuit

Improve win rates & profitability by documenting the go/no go decision for Opportunities

- 7 Add a new tab in the Firms Hub for client ranking
- 8 Improve account management & profitability with a formal evaluation of Client value & recognizing the firms most responsible for your success

**Firms** | Edit Search | Find firm | 2 of 50+ | + New

**Abbey Carpet Company, Inc.**  
Last modified 12/6/2021 06:46 pm by William Berry

**RANKING**

<b>Ranking</b>	<b>Completion Date</b>	<b>Completed By</b>
A	12/6/2021	Abby Collins
<b>Approved By</b>	Amy Ball	

**Evaluation Data**

<input checked="" type="checkbox"/> Excellent Reference	<input checked="" type="checkbox"/> Pays on Time	<b>Other Comments</b>
<input checked="" type="checkbox"/> Consistent Good Margins	<input checked="" type="checkbox"/> Numerous Repeat Projects	

**Client Profile**

<b>Business Size</b>	<b>Coverage</b>	<b>Years in Business</b>
Large	National	> 10
<b>Specialties</b>		
1	2	3
Environmental	Transportation	Geotechnical

+ Add Specialties

30 Years Experience

+ Open SQL Database

+ Master File Generator

+ Screen Design Tools

+ SQL Scripting

+ Automation Tools

=

AMR Lite Toolkit