



Deltek INSIGHT > 2019

VPVI-34:

Build Out a Marketing Infrastructure – More Than Just an Accounting System

Stacie Ferrell, Stambaugh Ness

Agenda

- 🍊 Introductions
- 🍊 Develop a Marketing Project Close Out Process
- 🍊 Develop a Resume Maintenance Process
- 🍊 Questions
- 🍊 Come See Us

A close-up photograph of several bright orange oranges hanging from a tree branch with green leaves. The background is a soft-focus orchard with more oranges and greenery.

Introductions

Stambaugh Ness



Provides **Professional Services Firms** with a **Future-Ready** approach that aligns services to our client's needs

650+ Clients in **43 States & Canada**



265+ Years of **Professional Experience** in the **Architectural and Engineering** industries

219+ Years of **Experience** working with **Deltek** solutions
Nationally Recognized Deltek **Platinum Partner**

Stacie Ferrell, Senior Consultant

- 🍊 20+ years working with Deltek systems
- 🍊 20+ years of A/E Industry Marketing Experience
- 🍊 Specializes in:
 - 🍊 CRM Implementation & Training
 - 🍊 Proposals (Custom and Government) Implementation & Training
 - 🍊 CRM System Reviews
 - 🍊 CRM Process Assessments and Development
 - 🍊 CRM Data Importing
 - 🍊 Workflows

A close-up photograph of several bright orange oranges hanging from a tree with green leaves. The oranges are in sharp focus in the foreground, while the background is softly blurred, showing more oranges and foliage. The overall scene is vibrant and natural.

Develop a Marketing Project Close Out Process

Develop a process as a Project nears completion to gather key details from Project Team members before files are archived from the network.

Objectives

- Finalize Project Descriptions, Classifications and Resume Data
- Quickly Export Tailored Project Profiles from Vision for Project Manager's Review
- Schedule Project for Photography, if applicable
- Distribute Client Surveys / request Reference Letters
- Determine if the Project is Worthy of an Award Submittal
- Develop Workflows to Assist in Data Gathering / Tasks

Define Marketing Project Close Out Needs

- Identify Current Pain Points
 - Maintaining Project Descriptions
 - Classifying Projects (Maintaining Key Statistics, Aspects, etc.)
 - Distributing Client Surveys / Requesting Reference Letters
 - Scheduling Photography
 - Identifying Projects Worthy of Award Submittals

Evaluate Current Fields & Access

- Does the Current Configuration Meet All of Marketing's Needs?
 - Do fields currently exist for tracking required data?
 - Verify standard fields haven't been hidden
 - Does Marketing have access to maintain the fields necessary for their proposal needs?
 - Do drop-down fields contain all Marketing required options?
 - Identify additional fields required by Marketing, such as:
 - Square Footage / Site Size / Diameter
 - Sustainability Features
 - Construction and/or Delivery Types
 - Number of Units, Traffic Signals, etc.
 - Security / ATRP Features

Evaluate Current Fields & Access

- How Will *Shared* Fields Be Managed?
 - Will Marketing Users Have Access to Commonly Shared Project Fields?
 - Long Name (If the Project Long Name field is used for Invoicing may want to consider addition of Marketing Name UDF)
 - Primary Client (can differ from Billing Client)
 - Primary Contact
 - Project Type
 - Location Fields
 - Fields on Dates & Costs Tab

Project Fields Typically *Owned* by Marketing

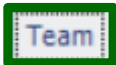
- Dates & Costs Tab (*All Fields*)
- Team Tab
 - Employees & Vendors Grids (*Role & Role Descriptions*)
- Clients/Contacts Tab
 - Clients & Contacts Grids (*Role & Role Descriptions*)
- Background Tab (*All Fields*)

Project Fields Typically *Owned* by Marketing

Dates & Costs

Initial Dates		Completion Dates			
Bid	<input type="text" value=""/>	Estimated	<input type="text" value="7/1/15"/>	Construction	<input type="text" value=""/>
Contract	<input type="text" value=""/>	Actual	<input type="text" value="7/1/15"/>	Professional Services	<input type="text" value=""/>
Start	<input type="text" value=""/>	Comment	<input type="text" value=""/>		
Costs (Construction Values)					
Total Project Cost	<input type="text" value="100,000.00"/>				
Total Project Cost Comment	<input type="text" value=""/>				
Firm Cost	<input type="text" value="100,000.00"/>				
Firm Cost Comment	<input type="text" value=""/>				

Project Fields Typically *Owned* by Marketing



Employees									
Name	Role	Role Description	Team Status	Hours	Title	Status	Start Date	End Date	
Cohen, Grace	Interior Designer	responsible for the interior design of the project consisting of	Active		Senior Interior Designer	Active	1/1/95	6/6/05	
Hertz, Johnathan	Civil Engineer	responsible for managing all for the site work.	Active		Civil Engineer	Active	1/25/05	6/10/05	
Thompson, Robert			Active		Project Manager	Active	1/1/95	6/6/05	
Gonzalez, Luis			Active		Interior Designer	Active	1/1/95	4/21/05	
Hightower, John			Active		Architect	Terminate	4/5/05	4/21/05	
Wellington, George			Active		Architect	Active	4/5/05	6/6/05	
Davisson, Emily			Active		Structural Engineer	Active	1/1/95	4/21/05	
MacKenzie, Jonathon			Active		Structural Engineer	Active	1/1/95	5/6/05	

Vendors									
Name	Role	Role Description	Team Status	Cost Amount	Status	Address Description	Address1	City	
Blueprints Etc.			Proposed		Active	<Default>	125 Congress Street	Boston	
Executive Travel Consultants			Proposed		Active	<Default>	190 Newbury Street	Boston	
Bell Atlantic Telephone			Proposed		Active	<Default>	123 Aurora Lane	West Peabody	
Sprint International			Proposed		Active	<Default>	2300 Independence Way	Marblehead	
Kensington Associates			Proposed		Active	<Default>	4000 America Way	Dallas	
Fitzgerald Engineering Inc.	Cost Estimating		Proposed		Active	<Default>	4500 Stanton Way	Chapel Hill	
Xionic Architectural Firm			Proposed		Active	<Default>	P.O. Box 5460	Beverly Hills	
Wesley Wayne Architects			Proposed		Active	<Default>	4500 Telleform Drive	Baton Rouge	

Project Fields Typically *Owned* by Marketing

Clients/Contacts

Clients									
Client	Vendo	Name	Role	Role Description	Type	Status	Address Description	Phone	Address1
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Atlantic Research Corporation (Billing and Primar	Primary Client		Commercial	Active	Headquarters	703.644.5800	562 Cherokee Road
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Atlantic Research Corporation			Commercial	Active			

Contacts							
Name	Client/Vendor	Role	Role Description	Title	Phone	Address1	City
Collier, Paul A. (Primary)	Atlantic Research Corporation	Owner Contact		Project Manager	703.644.5800	562 Cherokee Road	Alexandria
Taylor, Wesley A.	Atlantic Research Corporation	Primary Client Contact		Project Manager	44 (0) 20 751	3 Hanover Square	London

Project Fields Typically *Owned* by Marketing

Background

The screenshot displays a software interface with three distinct data tables, each with its own header and action buttons (Insert, Delete).

Project Codes

Project Code	SF330 Code	Description	Fees	Seq.
058	L01	Laboratories; Medical Research Facilities	60,555	1
048	H09	Hospitals & Medical Facilities		2
013	C04	Chemical Processing & Storage		3
059	L03	Landscape Architecture		4

Descriptions

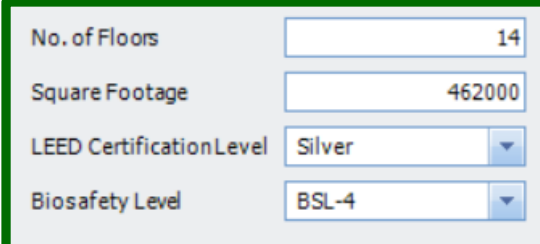
Category	Description	Default
Brief Description	The new 14 story, 462,000 sq ft facility quadruples the size of the existing facility. T	<input type="checkbox"/>
Detailed Description	All systems within the Adelphi Research Lab (ARL) are built with engineered and hu	<input type="checkbox"/>
Resume Description	The new 14-story, 462,000 sq ft facility quadruples the size of the existing facility. T	<input type="checkbox"/>

Awards

Description	Institution	Award Date
-------------	-------------	------------

Build Out of Additional Required Fields

- Create Additional Required Fields / Tabs Identified in Previous Step
 - Consider Ultimate Reporting / Searching Needs to Determine Best Field Format (drop-down, character, etc.)
 - If Multiple Selections are Required Consider Checkboxes or Grids
 - Determine Which Users Will be Responsible for Managing the Marketing Data and Update Security as Applicable
 - Be Selective When Adding UDFs
 - Are they **really** necessary?



No. of Floors	<input type="text" value="14"/>
Square Footage	<input type="text" value="462000"/>
LEED Certification Level	<input type="text" value="Silver"/>
Biosafety Level	<input type="text" value="BSL-4"/>

Project Close Out Sample Screen Shots

PROJECT MANAGERS

Please provide responses for each of the following once the Project reaches 95% complete.

Is the Project Marketable?

Will The Client Provide a Good Reference?

Project Client Reference

Is the Project Award Worthy?

Does the Project Warrant Photography?

Client Survey Contact

Owner Occupancy Date

Final Construction Cost

Total Square Footage

Total Site Size

Total Number of Buildings

Total Number of Stories

Total Number of Parking Spaces

Green Building Certifications? If yes, select the applicable certifications below.

<input type="checkbox"/> BOMA 360 Performance Program	<input type="checkbox"/> National Green Building Standard
<input type="checkbox"/> ENERGY STAR for Buildings	<input type="checkbox"/> NZEB: Net Zero Energy Building
<input type="checkbox"/> ENERGY STAR for Homes	<input type="checkbox"/> Passive House
<input type="checkbox"/> Green Globes	<input type="checkbox"/> Parksmart
<input type="checkbox"/> HERS: Home Energy Rating System	<input type="checkbox"/> WELL Building Standard
<input type="checkbox"/> LEED (USGBC)	<input type="checkbox"/> Zero Tool
<input type="checkbox"/> Living Building Challenge	

Unique Project Aspects

MARKETING MANAGERS

Marketing Manager

Marketing Actions Checklist:

- Marketing Project
- Update Primary Contact
- Send Client Satisfaction Survey
- Add to Photography Schedule
- Add to Award Submittal Listing
- Update Project Descriptions with Project Manager
- Update Project Statistics
- Update Resume Descriptions / Roles
- Request Client Reference Letter

When updating Project Descriptions be sure to document key aspects of Project in addition to Challenges / Solutions; unique Project aspects; Sustainability items, etc.

In addition, document Client Feedback received from Client Satisfaction Survey and/or Client Reference Letter in Vision.

Marketing Project Close Out Complete

Marketing Project Close Out Complete Date

Determine Trigger for Project Close Out

- Do Fields Currently Exist for Triggering the Marketing Project Close Out Process?
 - Are Standard Percent Complete Fields Being Populated?
 - Is the Project Status Updated to Dormant When Completed?
- Will All Projects Require Updates on Project Close Out or Only Those Identified as “Marketing” Projects?
 - Consider Addition of Marketing Project checkbox field for quickly identifying Projects

Automating Triggers for Project Close Out

- Determine How the Project Close Out Process Will be Triggered
- Determine How Staff Will be Notified
 - Email
 - Scheduled Report
 - Activity / Task Assignment
- Develop Workflows to Notify Staff When a Project Meets the Established Criteria

Automating Triggers for Project Close Out

- If Projects are Closed by Accounting after last Invoice is Sent (*Project Status updated to Dormant*) Email Notifications Can be Sent Through Simple Workflow to Initiate the Marketing Project Close Out Process.
- The Sample Workflow Shown on the Following Slides sends an Email to the Project Manager when a Project's Status is updated to Inactive.

Automating Triggers for Project Close Out

The image displays three overlapping screenshots from the Deltek software interface, illustrating the configuration of an automated workflow for project close out.

Top Screenshot: User Initiated Workflow

This window shows the main configuration area. The 'Application' is set to 'Projects'. Below, a table lists the workflow configuration:

Workflow Table	Workflow Type	Level	Active	Description	Conditions
[Project Record]	Change	Project	<input checked="" type="checkbox"/>	Project Manager Notification of Marketing Project Close Out Request	<conditions defined>

Middle Screenshot: Actions

This window shows the configuration for the workflow's actions. A table lists the actions:

Action	Level	Active	Description
Email Alert		<input checked="" type="checkbox"/>	Email to Project Manager Requesting Database Completed on Marketing Project Close Out Tab

Bottom Screenshot: Conditions

This window shows the configuration for the workflow's conditions. A table lists the conditions:

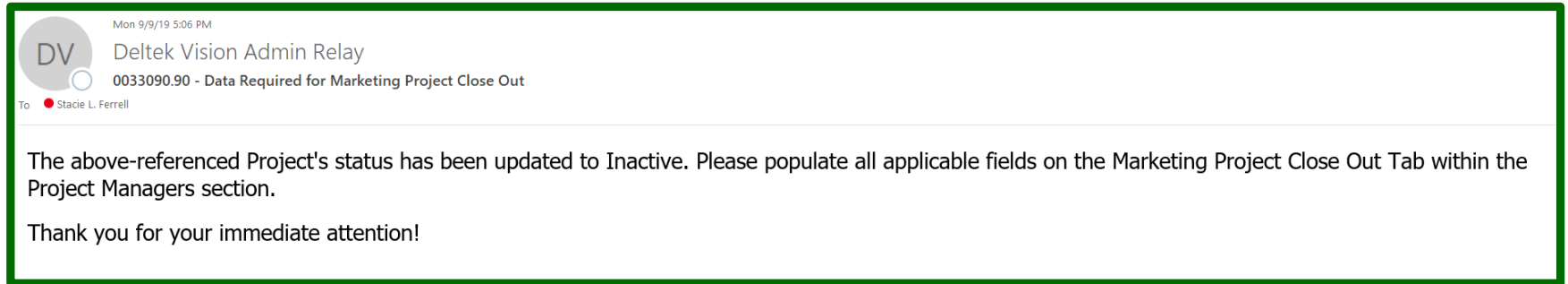
Column	Operator	Value	AND/OR
PR.Status	has changed		AND
PR.Status	equals	Inactive	

Right Screenshot: Email Configuration

This dialog box is used to configure the email alert. It includes fields for 'To', 'cc', 'bcc', 'Emails', 'Users', 'Roles', and 'Employee Fields' (set to 'Project Manager'). The subject is '[PR.WBS] - Data Required for Marketing Project Close Out'. The body text reads: 'The above-referenced Project's status has been updated to Inactive. Please populate all applicable fields on the Marketing Project Close Out Tab within the Project Managers section. Thank you for your immediate attention!'.

Automating Triggers for Project Close Out

Sample Email Received by Project Manager



Pulling Data from Transactional Tables

- Workflows Can be Created to Pull Data from Labor Detail Tables (*timesheet entries associated to Project*)
 - First Posted Labor Date
 - Last Posted Labor Date
- Data Can be Pulled Into Stand-Alone User Defined Fields or Into the Employees Grid on the Team Tab to Populate Individual Start and End Dates

Pulling Data from Transactional Tables

Scheduled Workflow Buttons to Populate Start and End Dates for Employees

Employees' Start Date and End Date fields in the grid below are populated through scheduled workflow.
Start Date = First Labor Detail transaction date for Employee
End Date = Most recent Labor Detail transaction date for Employee (can also add to only populate when a Project is Dormant so the field only populates when a Project has been completed).

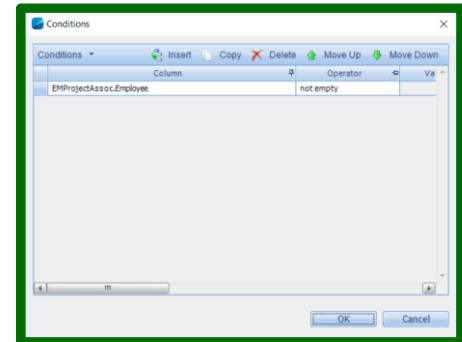
End Date Start Date

Employees										Refresh Hours	Associate	Remove
Name	Role	Role Description	Team Status	Hours	Title	Status	Start Date	End Date				
Apple, William			Proposed		President	Active						
Bartlett, James	Principal-In-Charge	Responsible for the overall project schedule, quality and budget aspects of this new research facility.	Proposed		Principal	Active						
Bartlett, James	Supervisor		Proposed		Principal	Active						
Cohen, Grace	Interior Designer	Responsible for the interior design of the project consisting of space planning and traffic flow.	Proposed		Senior Interior Designer	Active	4/9/05	6/5/05				
Wright, Francis	Project Manager	Mr. Wright's responsibilities included overall design direction and management of all internal team m	Proposed		Studio Director - Architectural Desig	Active		4/30/11				

Pulling Data from Transactional Tables

Workflow Table	Level	Schedule	Description	Conditions	Schedule
[Project Record]	All	<input type="checkbox"/>	Closes Promotional Project When Regular Project Opened	<conditions defined>	
[Project Record]	Project	<input type="checkbox"/>	Populate Last Posted Activity Date	<conditions defined>	
[Project Record]	All	<input type="checkbox"/>	Updates Custom Fee / Revenue fields	<conditions defined>	
EMProjectAssoc	All	<input type="checkbox"/>	Populate Employee End Date column - only populates for Dormant Projects	<conditions defined>	
EMProjectAssoc	All	<input type="checkbox"/>	Populate Employee Start Date column	<conditions defined>	

NOTE: Conditions are required for Scheduled Workflows.
(EMProjectAssoc.Employee is not empty)



Pulling Data from Transactional Tables

Populate Employee Start Date column

Action	Level	Active	Description	Conditions
Column Change	All	<input checked="" type="checkbox"/>	Populate Start Date column	

Column Change Configuration

Column:

New Value: Empty Field

New Value SQL Expression:

Apply change to lower WBS Levels

OK Cancel

SQL Expression Builder

<New Calculated Field >

Column: [EMProjectAssoc.CreateDate], [EMProjectAssoc.CreateUser], [EMProjectAssoc.CRMHours], [EMProjectAssoc.Employee], [EMProjectAssoc.EndDate]

Calculator: 7 8 9 /, 4 5 6 *, 1 2 3 -, 0 . +, (...exp...), (,)

Use a Condition: =, <, >, >=, <=, AND, OR

Undo Clear

Expression: (select top 1 transdate from LD where employee=[EMProjectAssoc.Employee] and WBS1=[EMProjectAssoc.WBS1] order by transdate asc)

Save Cancel

Merge Templates to Distribute Drafts

- Develop Merge Templates to Distribute Existing Data to Project Manager / Technical Team Members for Verification and Update
 - Helpful if only Marketing Team Members Will be Granted Access to Maintaining Descriptions and Statistical Data in Vision
 - Data Can be Exported Into Word and Sent to Staff Members for Their Updates (*enable track-changes*)
 - **NOTE:** CRM Type of Role (in Security Roles) Must be Selected to Allow for using Merge Templates in the Info Centers by Users. Access to Specific Merge Templates is Also Assigned in Security by Role.

Sample Project Verification Merge Template

- Sample Project Data Verification Merge Template

Vision Database Project Data Verification Form	
<p>[[Begin Projects]]The data provided on the following pages is a comprehensive summary of the information that has been entered for the project within the Vision Marketing Database. Please review the information for accuracy and provide additional information where missing. NOTE: Not all fields will apply for all projects, please only answer those that are applicable. Thank you for your assistance in keeping Apple & Bartlett marketing materials up-to-date.</p>	
Project Manager's Name:	[Projmgr]
Today's Date:	9/9/19
Date Vision Record Created	[@DATE('mm/d/yy',Createdate)]
Vision Record Created By	[Createuser]
Date Vision Last Modified	[@DATE('mm/d/yy',Moddate)]
Vision Record Modified By	[Moduser]
VISION GENERAL TAB	
Short Name	[Name]
Long Name	[Longname]

Sample Project Verification Merge Template

Vision Database Project Data Verification Form		
<p>The data provided on the following pages is a comprehensive summary of the information that has been entered for the project within the Vision Marketing Database. Please review the information for accuracy and provide additional information where missing. NOTE: Not all fields will apply for all projects, please only answer those that are applicable. Thank you for your assistance in keeping Apple & Bartlett marketing materials up-to-date.</p>		
Project Manager's Name:	Francis Lloyd Wright	
Today's Date:	9/9/19	
Date Vision Record Created	08/2/05	
Vision Record Created By	ADMIN	
Date Vision Last Modified	10/2/17	
Vision Record Modified By	ADMIN	
VISION GENERAL TAB		
Short Name	Adelphi Research Lab	
Long Name	Adelphi BioMed Research Lab Design and Construction Management	
Primary (Responsible) Office	Boston Architecture	
Project Manager	Francis Lloyd Wright	
Project Type (Pull-down)		
Project Type	Medical	
Responsibility	Prime	
Federal Project?	N	
Referable?	N	
Primary Client & Contact Information (used as Project Reference for Marketing Materials)		
Primary Client	BioMed Technologies LTD Dalton Brothers Construction Co.	Should Client be Marked as Confidential for this Project? (Y/N)
Client Contact Name	Mr. Jonathan Edwards William Stringham	Email
Client Contact Title	Vice President	Office Phone
Cell Phone		Fax
Client Number	00000034250000DALTON	Client Type
Address	45 Bottle Top Rd.	Health Care/Commercial
City	Franklin	State/Province
Zip Code	34832	Massachusetts
Web Site	www.biomed.com/www.dbc.com	
VISION PROJECT LOCATION TAB		
Project Address		
Street Address	2307 Burlington Blvd	
City	Lexington	
State	Massachusetts	
Zip Code	02420	
Country		
Country	United States	

Vision Database Project Data Verification Form	
VISION DESCRIPTIONS / CODES TAB	
ALL Available Description Categories	
<p>Vision Default Description Definitions:</p> <ul style="list-style-type: none"> Project Description – default description used for all Project Profiles (custom formats, SF330s, etc.) 330 Resume Description – default abbreviated description used for Employee resumes Services Provided – bulleted listing of services provided by Apple & Bartlett under the contract 	
<p>Description Category: Brief Description - The new 14 story, 462,000 sq ft facility quadruples the size of the existing facility. The new lab changed the Lexington skyline and raised the profile of research in Massachusetts.</p>	
TEST	
<p>Description Category: Detailed Description - All systems within the Adelphi Research Lab (ARL) are built with engineered and human redundancies in place to assure safe options at all levels. The ARL is owned, operated and located on the Adelphi Research campus. Adelphi has long considered the safety of its employees and researchers - and the community as a whole - paramount. The ARL uses double High-Efficiency Particulate Air (HEPA) filters and contains redundant systems within the utility, power and mechanical infrastructure. Biosafety labs that include biosafety level 4 (BSL-4) facilities are one of the most safely designed and constructed types of buildings in the world. It is for this reason that over a combined 80 years of operation, there has never been an environmental release from a BSL-4 facility in North America. State-of-the-art systems built into the design of the ARL help protect workers and prevent any release of infectious agents. Use of cutting-edge technologies coupled with state-of-the-art security and audit systems and highly trained employees form the building blocks for the ARL. Proper oversight, monitoring and transparency are central to the lab's operations and mission. The Institutional Biosafety Committee, the Community Liaison Committee, and the Community Advisory Board are a few of the Committees that ensure safety and transparency of ARL operations.</p>	
<p>Description Category: Resume Description - The new 14-story, 462,000 sq ft facility quadruples the size of the existing facility. The new lab changed the Lexington skyline and raised the profile of research in Massachusetts. All systems within the Adelphi Research Lab (ARL) are built with engineered and human redundancies in place to assure safe options at all levels. The ARL uses double High-Efficiency Particulate Air (HEPA) filters and contains redundant systems within the utility, power and mechanical infrastructure. Biosafety labs that include biosafety level 4 (BSL-4) facilities are one of the most safely designed and constructed types of buildings in the world.</p>	
Project Codes	
Insert Project Codes from Pull-down Menu	CD4 - 013 - Chemical Processing & Storage HD9 - 048 - Hospitals & Medical Facilities LO1 - 058 - Laboratories; Medical Research Facilities LO3 - 059 - Landscape Architecture LO6 - 062 - Lighting (Exteriors; Street; Memorials; Athletic Fields)
Awards	
Description / Institution / Award	

A close-up photograph of several bright orange fruits hanging from a tree branch with green leaves. The background is a soft-focus view of more oranges and foliage.

Develop a Resume Maintenance Process

Develop a process for streamlining resume updates and maintenance.
Store data centrally.

Objectives

- Manage Resume Reviews / Updates in Vision
- Simplify the Resume Process by Centrally storing all Project / Employee Information in Vision
- Quickly Export Tailored Resumes from Vision
 - No More **Master** Resume Files on Network Drives
- Develop Workflows to Assist in Data Gathering / Maintenance

Define Marketing Resume Needs

- Identify Current Pain Points
 - Maintaining Project Experience
 - Classifying Employees (Disciplines, Skills, etc.)
 - Requesting Resume Updates
 - Managing License and Certification Data

Determine Process for Resume Updates

- How Are Resumes Currently Maintained / Updated?
 - Is Initial Data Gathering During the Onboarding Process?
 - If so, is this data shared with Marketing for initial Resume development?
 - Has a Schedule Been Established for Resume Updates?
 - Annually to coincide with Reviews?
 - Periodically Throughout the Year?
 - On an as-needed basis during Proposal Development?
- How Will Updates be Documented in Vision?
 - Create User Defined Fields for Maintenance Purposes?

Evaluate Current Fields & Access

- Does the Current Configuration Meet All of Marketing's Needs?
 - Do fields currently exist for tracking required data?
 - Verify standard fields haven't been hidden
 - Does Marketing have access to maintain the fields necessary for their proposal needs?
 - Do drop-down fields contain all Marketing required options?
 - Identify additional fields required by Marketing, such as:
 - Publications
 - Presentations
 - Previous Project Experience
 - Professional Memberships
 - Awards
 - Languages

Employee Fields Typically Owned by Marketing

- Years with Other Firms / Prior Years with This Firm
- Suffix
- Experience Tab (*All Grids*)
- Projects Tab
 - Projects Can be Automatically Added to Grid When an Employee Charges Time to a Project. Marketing Typically Maintains the Role and Role Description Fields.
- Resumes Tab

Employee Fields Typically Owned by Marketing

General

Years with Other Firms

Prior Years with This Firm

Suffix

Employee Fields Typically Owned by Marketing

Experience

Education

Degree	Specialty	Institution	Year	Proposal
BArch	Architecture	University of Wisconsin - Madison	1984	<input checked="" type="checkbox"/>

Licenses

License	Earned	State/Province	Number	Expires	Last Renewal	Proposal
Registered Architect	3/10/88	Illinois	60-2569-7458	12/31/19	12/31/18	<input checked="" type="checkbox"/>

Skills

Skill	Level	Primary
Architects	Over Ten Years	<input type="checkbox"/>
Project Manager	Over Ten Years	<input checked="" type="checkbox"/>

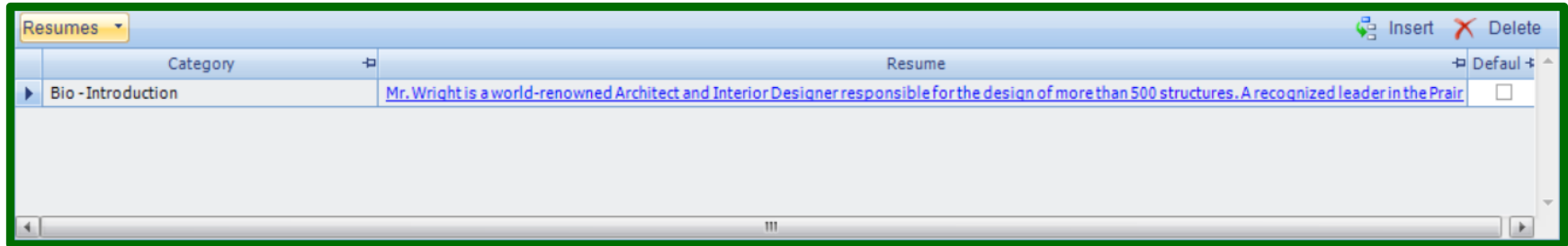
Employee Fields Typically Owned by Marketing

Projects

Projects						
Number	Long Name	Role	Description	Start Date	End Date	Project Status
2003005.00	Adelphi BioMed Research Lab Design and Construction Management	Project Manager	Mr. Wright's responsibilities included overall design direction		4/30/11	Active
001810P.17	Akron General Medical Center Renovation	Project Manager	Mr. Wright's responsibilities included overall design direction	6/30/10	8/15/14	Active
1999015.00	Balboa International Office and Commercial Complex	Project Manager	Mr. Wright's responsibilities included overall design direction	3/31/08	9/15/10	Dormant
1900064.01	Blackstone Group New Office Building	Project Manager				Active
1900064.02	Blackstone Group New Office Building	Project Manager				Active
0010909.20	Boston Women's and Children's Hospital	Project Manager	Mr. Wright's responsibilities included overall design direction	1/15/10	5/30/12	Active
1800297.00	Calvert County Schools - Schematics / Concepts Design	Project Manager				Active
1900201.00	Cambridge City Hall	Project Manager				Active
1900201.MK	Cambridge City Hall	Project Manager				Active
1998005.00	Cambridge YMCA Aquatic Facility Renovation	Project Manager	Mr. Wright's responsibilities included overall design direction	3/15/09	6/30/10	Dormant
2000012.00	Greater Baltimore Industrial Park	Project Manager	Mr. Wright's responsibilities included overall design direction	8/20/10	9/1/13	Dormant
001210P.17	Guggenheim Museum Renovation	Project Manager				Active
001210P.17	Guggenheim Museum Renovation	Principal-In-Charge				Active
1999010.00	Johnson & Johnson Medical Research Center	Project Manager	Mr. Wright's responsibilities included overall design direction	9/16/12	3/30/16	Active
0253698.52	Nates TestOpp	Project Manager				Active
0025365.24	New Trump Hotel	Project Manager				Active
0TEST12.56	Southland Hospital Expansion	Project Manager	Mr. Wright's responsibilities included overall design direction	6/15/13	10/1/15	Active
2563256.32	Test of In Pursuit Project Associated to Regular Project	Project Manager				Active
2019100.00	USACE - New Outpatient Facility	Project Manager				Active
Σ						

Employee Fields Typically Owned by Marketing

Resumes



Category	Resume	Default
Bio - Introduction	Mr. Wright is a world-renowned Architect and Interior Designer responsible for the design of more than 500 structures. A recognized leader in the Prair	<input type="checkbox"/>

Build Out of Additional Required Fields

- Create Additional Required Fields Identified in Previous Step
 - Consider Ultimate Reporting / Searching Needs to Determine Best Field Format (drop-down, character, etc.)
 - If Multiple Selections are Required Consider Checkbox Fields or Grids
 - Determine Which Users Will be Responsible for Managing the Marketing Data and Update Security as Applicable

Build Out of Additionally Required Fields

Certifications_						Insert	Copy	Delete
Certification	Issuing Organization	Certification Date	Certification Renewal	Proposal				
LEED AP Building Design and Construction	U.S. Green Building Council	2/15/14	2/14/18	<input checked="" type="checkbox"/>				
National Council of Architectural Registration Boards	National Council of Architectural Registration Boards	6/15/90	12/31/18	<input checked="" type="checkbox"/>				
Fellow American Institute of Architects	American Institute of Architects	5/31/99		<input checked="" type="checkbox"/>				
Construction Quality Manager	U.S. Army Corps of Engineers	1/31/10	12/31/18	<input checked="" type="checkbox"/>				

Professional Memberships_									Insert	Copy	Delete	
AFF - Membership Organization	AFF - Current Office	AFF - Previous Office	AFF - Annual Dues	AFF - Joined	AFF - Membership Re	AFF - Company Paid	AFF - Pr					
American Institute of Architects		National President	195.00	6/10/89	12/31/18	Yes						
U.S. Green Building Council			150.00	3/10/07	12/31/18	No						
			Σ	345.00								

Automations to Consider

- Develop Workflows to Notify Staff When a License is Close to Expiration
 - How Will Staff be Notified?
 - Email
 - Activity / Task Assignment
 - How Often Will the Reminders Be Sent?
 - 60 Days Before
 - 30 Days Before

Automations to Consider

The screenshot shows the 'Scheduled Workflow' application window. At the top, there are menu items: Save, Refresh, Print, and Help. Below that is a dropdown menu for 'Application' set to 'Employees'. A toolbar contains 'Insert', 'Copy', 'Delete', 'Schedule', 'Unschedule', and 'Status'. The main area is a table with columns: Workflow Table, Level, Schedule, Description, Conditions, and Schedule. Three rows are visible, all highlighted in orange:

Workflow Table	Level	Schedule	Description	Conditions	Schedule
EMRegistration		<input checked="" type="checkbox"/>	Employee License Expires in 60 Days	<conditions defined>	Every 1 Days at 10:00
EMRegistration		<input checked="" type="checkbox"/>	Employee License Expires in 30 Days	<conditions defined>	Every 1 Days at 10:00
EMRegistration		<input checked="" type="checkbox"/>	Employee License Has Expired	<conditions defined>	Every 1 Days at 10:00

The screenshot shows the 'Conditions' dialog box. It has a toolbar with 'Insert', 'Copy', 'Delete', 'Move Up', and 'Move Down'. Below the toolbar is a table with columns: Column, Operator, Value, and AND/OR. One row is visible:

Column	Operator	Value	AND/OR
EMRegistration.DateExpires	In days	60	

Automations to Consider

Action	Level	Active	Description	Conditions
Email Alert		<input checked="" type="checkbox"/>	60 day license expiration notification	<conditions defined>

Email Configuration

To: CC BCC

Emails:

Users:

Roles:

Employee Fields:

Subject:

You have a license expiring in the next 60 days

Body:

[EMAILCompany.FirstName],
Your [EMRegistration.Registration] license in [EMRegistration.StateRegistered] will expire on [EMRegistration.DateExpires].
Please submit your renewal in a timely manner to avoid any lapse in licensing.
If you have already renewed your license please update your Employee record in Vision by going to the Experience Tab / License

Conditions

Column	Operator	Value	AND/OR
EMAllCompany.Status	equals	Active	AND
EMRegistration.IncludeInProposal	equals	Y	

User Defined Field Populated with Employee number through workflow used for Email notifications

Automations to Consider



Wed 9/11/19 10:00 PM

Deltak Vision Admin Relay

You have a license expiring in the next 60 days

To  Stacie L. Ferrell

Thomas,

Your **Professional Engineer** license in **GA** will expire on **11/10/2019**.

Please submit your renewal in a timely manner to avoid any lapse in licensing.

If you have already renewed your license please update your Employee record in Vision by going to the Experience Tab / License Grid and updating the appropriate line.

Thank you for your immediate attention!

Merge Templates to Distribute Drafts

- Develop Merge Templates to Distribute Existing Data to Employees for Verification Update
 - Helpful if only Marketing Team Members Will be Granted Access to Maintaining Resume Categories and Supplemental Resume Data in Vision
 - Data Can be Exported Into Word and Sent to Staff Members for Their Updates (*enable track-changes*)

Sample Resume Verification Merge Template

- Sample Employee Data Verification Merge Template

Vision Database Employee Data Verification Form	
<i>[Begin Employees]</i> The data provided on the following pages is a comprehensive summary of the information that has been entered for the Employee within the Vision Marketing Database. Please review the information for accuracy and provide additional information where missing. NOTE: Not all fields will apply for all Employees, please only answer those that are applicable. Thank you for your assistance in keeping Apple & Bartlett marketing materials and your individual resume files up-to-date.	
Today's Date:	9/16/19
Date Vision Last Modified	[Moddate]
Vision Record Modified By	[Moduser]
VISION GENERAL TAB	
Employee Last Name	[Lastname]
Employee First Name	[Firstname]
Title	[Title]
Email Address	[Email]
Office / Organization	[Organization: Name]
Hire Date	[@DATE('mm/d/yy',Hiredate)]
Years with A&B (Calculated Field)	[YearsWithFirm]
Years with Other Firms	[Yearsotherfirms]

Sample Resume Verification Merge Template

Vision Database Employee Data Verification Form	
<p>The data provided on the following pages is a comprehensive summary of the information that has been entered for the Employee within the Vision Marketing Database. Please review the information for accuracy and provide additional information where missing. NOTE: Not all fields will apply for all Employees, please only answer those that are applicable. Thank you for your assistance in keeping Apple & Bartlett marketing materials and your individual resume files up-to-date.</p>	
Today's Date:	9/16/19
Date Vision Last Modified	9/5/2019 8:04:56 PM
Vision Record Modified By	APPLE
<hr/>	
VISION GENERAL TAB	
Employee Last Name	Wright
Employee First Name	Francis
Title	Studio Director - Architectural Design
Email Address	sferrell@stambaughness.com
Office / Organization	Corporate
Hire Date	03/1/94
Years with A&B (Calculated Field)	25
Years with Other Firms	10
<hr/>	
VISION BACKGROUND TAB	
Education / Specialized Training	BArch / Architecture / University of Wisconsin - Madison / 1984
Registrations / Licenses	Registered Architect State: Illinois Number: 60-2569-7458 Earned: 03/10/88 Expires: 12/31/19 Active? Y
Skills / Discipline Codes	Architects / PRIMARY?: N Project Manager / PRIMARY?: Y NOTE: Only one skill can be marked as 'Primary'. The Primary skill associated with the Employee is the skill associated for Employee Census reports, etc.

Vision Database Employee Data Verification Form	
<p>associated with their records:</p> <ul style="list-style-type: none"> General Introductory Paragraph – category should contain brief bio of Employee and highlight specific skills and experience Areas of Expertise – should contain a brief, bulleted listing of Employee skills / specialties / areas of practice Professional History – listing of previous Employment history in reverse chronological order 	
Resume Categories Associated with Employee Record	
Resume Category - Bio - Introduction	
<p>Mr. Wright is a world-renowned Architect and Interior Designer responsible for the design of more than 500 structures. A recognized leader in the Prairie School movement of architecture, he developed the concept of the Usonian home, his unique vision for urban planning in the United States.</p> <p>Mr. Wright was recognized by the American Institute of Architects as "the greatest American architect of all time".</p>	
<hr/>	
VISION PROJECTS TAB	
Projects Linked to Employee Record	<p>In addition to the Resume text provided above Employees are also linked to individual Project records within the Vision database which allows to enhanced searching capabilities and the ability to build resumes not only by category (as described above), but also by query (searching for specific projects the Employee is linked to within the database).</p> <p>In order to more efficiently build resumes for government submittals (SF330s, etc.) it is critical that Employees are linked to applicable Project records. We also have the ability to track specific Employee responsibilities on each job. Please add specific role / responsibility data to key projects where possible.</p> <p>Below is a listing of all Projects linked to your specific Employee record within the database.</p> <p>2003005.00 - Adelphi BioMed Research Lab Design and Construction Management Role: Project Manager Completion Date: 05/28/09 Total Project Cost: \$75,000,000 Cost Comment:</p>

Building Resumes in Vision

- Simple Resumes From the Employees Info Center
 - Allows Users to Merge *Master / Complete* Resumes Directly from the Info Center
- Using Vision Custom Proposals Module for Resumes
 - The Custom Proposals Module Allows Users to Select Specific Projects to Include in the Resume
 - Ability to Search Project Fields (*Type, Project Codes, Completion Dates, Cost, etc.*) to only include the most relevant Projects

Building Resumes in Vision

- Simple Resume Template for Use in Info Center

```
[Begin Employees]
[Firstname][{` `(Middlename)}] [Lastname][{`, `(Suffix)}]
[Title]

Degrees:
[Degrees:][Degree][{`/'(Specialty)}][{`/'(Institution)}][{`/'(Yearearned)}]
[End]

Licenses:
[Licenses:][License][{` #'(Licensenumber)}][{`/' @fullstatename(Statelicensed)}][{`/' @DATE(`
YYYY`,Dateearned)}]
[End]

Experience:

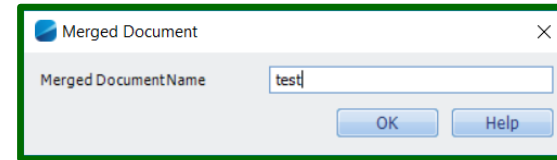
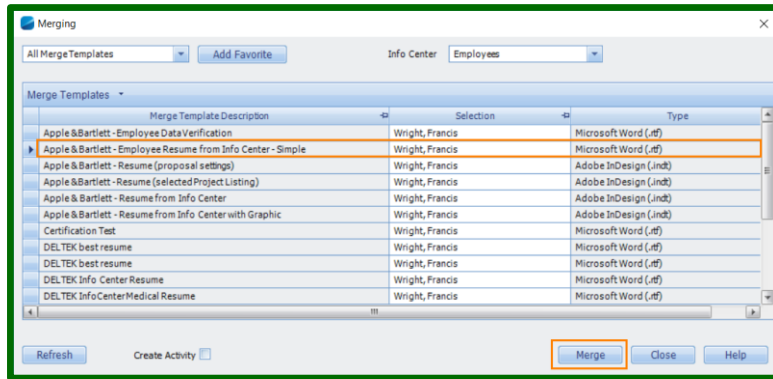
[Projects:][Longname], [@Optional(`%, `,City)][@fullstatename(State)]
[Employee Role]. [RoleDescription]. $[@CURRENCY(TotalOrFirmCost)].
[@DATE(`d/mm/yy`,EmployeeStartDate)][{` - ` @DATE(`d/mm/yy`,EmployeeEndDate)}]

[End]
```

Project Data is pulled from the Projects grid in the Employees Info Center and the Projects Info Center.

Building Proposals in Vision

- Select the Merge icon from the Employees Info Center Toolbar and select 'Merge Current Employee'
- Select the Applicable Merge Template and Click 'Merge'
- Provide a Name for your Document and select 'OK'.



Building Resumes in Vision

Francis Lloyd Wright

Studio Director - Architectural Design

Degrees:

BArch/Architecture/University of Wisconsin - Madison/1984

Licenses:

Registered Architect#60-2569-7458/Illinois/1988

Experience:

Adelphi BioMed Research Lab Design and Construction Management, Lexington, Massachusetts

Project Manager. Mr. Wright's responsibilities included overall design direction and management of all internal team members. \$75,000,000. - 30/04/11

Akron General Medical Center Renovation, Akron, Ohio

Project Manager. Mr. Wright's responsibilities included overall design direction and management of all internal team members. \$0. 30/06/10- 15/08/14

Balboa International Office and Commercial Complex,

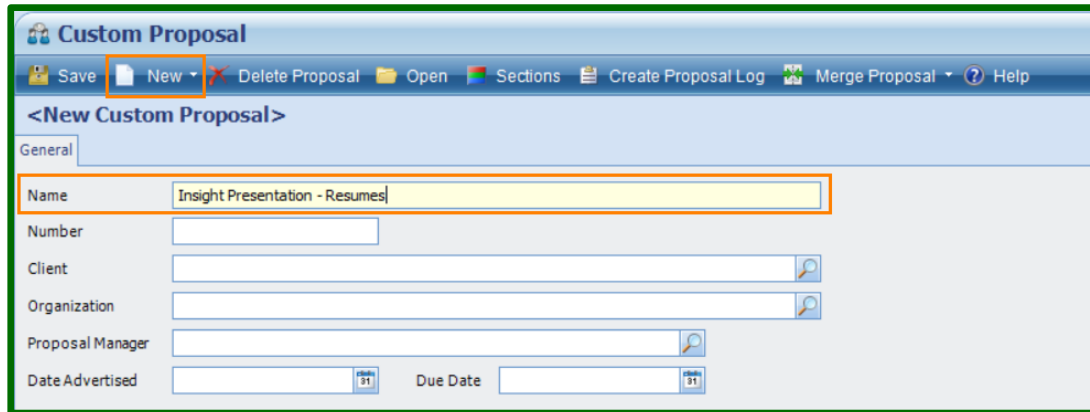
Project Manager. Mr. Wright's responsibilities included overall design direction and management of all internal team members. \$5,000,000. 31/03/08- 15/09/10

Boston Women's and Children's Hospital, Newsome, Massachusetts

Project Manager. Mr. Wright's responsibilities included overall design direction and management of all internal team members. \$16,500,000. 15/01/10- 30/05/12

Building Resumes in Vision

- The Custom Proposals Module Must Be Used if You Want to Select Specific Projects to Include on the Employee Resume
- Create a New Custom Proposal by Selecting 'New' from the Custom Proposal Taskbar



The screenshot shows the 'Custom Proposal' application window. The title bar reads 'Custom Proposal'. The menu bar includes 'Save', 'New', 'Delete Proposal', 'Open', 'Sections', 'Create Proposal Log', 'Merge Proposal', and 'Help'. The 'New' button is highlighted with a red box. Below the menu bar, the window title is '<New Custom Proposal>'. The 'General' tab is selected. The form contains the following fields:

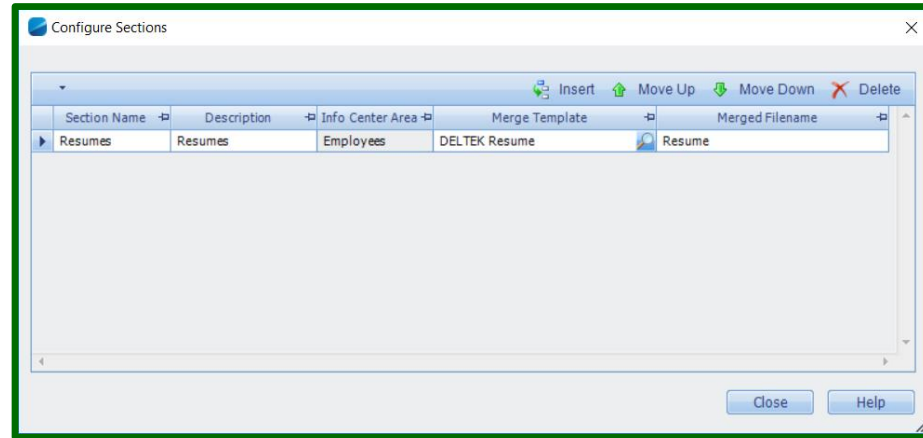
Name	Insight Presentation - Resumes	
Number		
Client		
Organization		
Proposal Manager		
Date Adversised	31	Due Date 31

The Proposal Name is required. All other data on the General Tab is optional.

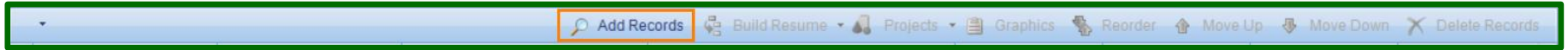
Building Resumes in Vision

- Select 'Save' to Create the Proposal Record
- Select the 'Sections' Icon from the Custom Proposal Taskbar to Define Your Employee / Resume Section

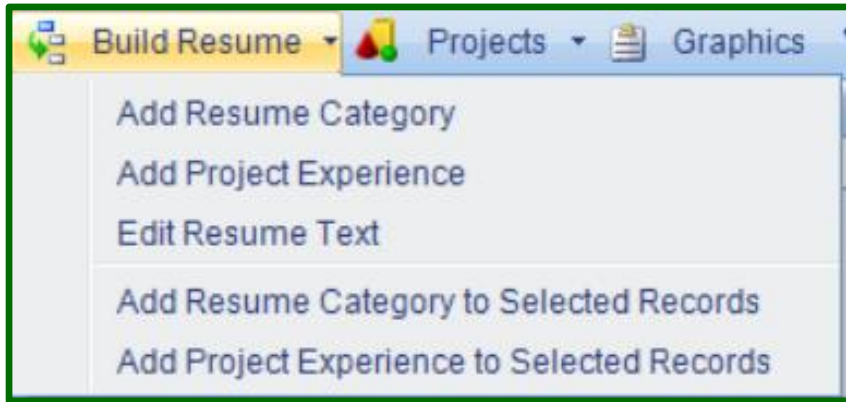
Resumes



Building Resumes in Vision



- Select 'Add Records' To Select the Employee(s) to be Included
- Using the Employee Lookup Add the Employee(s)
- Select 'Build Resume' from the Proposal Section Taskbar

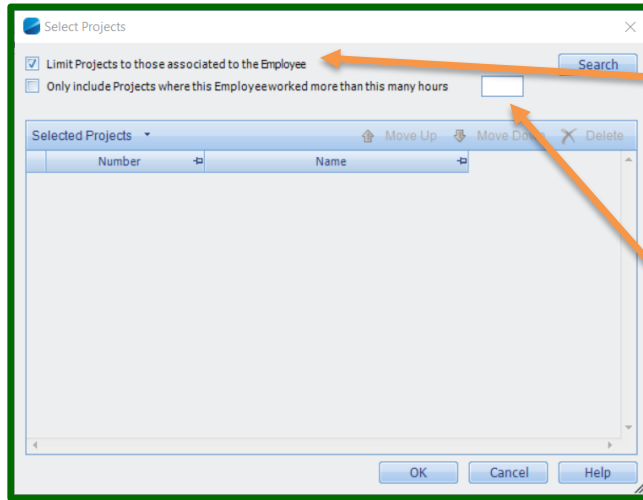


Add Resume Category allows users to select specific Resume Categories instead of pulling data directly from Projects.

Add Project Experience allows users to select specific Projects that the Employee is associated to in Vision.

Building Resumes in Vision

- To Add Specific Projects Select 'Add Project Experience'
- The Select Projects Screen Will Appear Allowing Users to Select Specific Projects to Include on the Resume

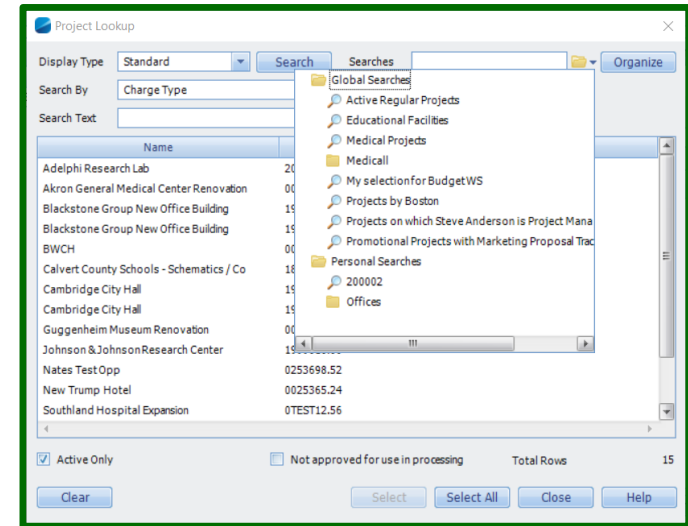


Projects will be limited to only those the Employee is associated to by default.

You can further limit to only those the Employee has charged a minimum amount of hours to.

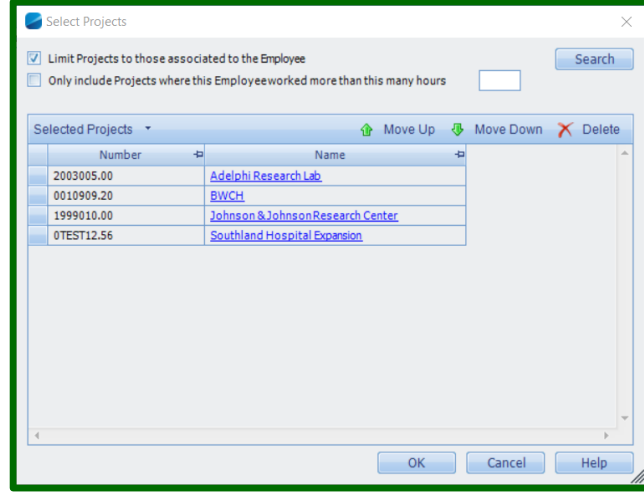
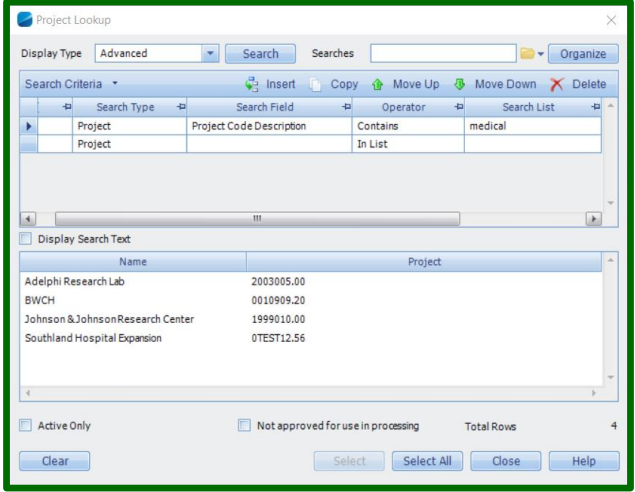
Building Resumes in Vision

- To Open the Search Dialogue Select the Search Button
- Users Can Select from Standard or Advanced Searches.
- Saved Searches are Also Available



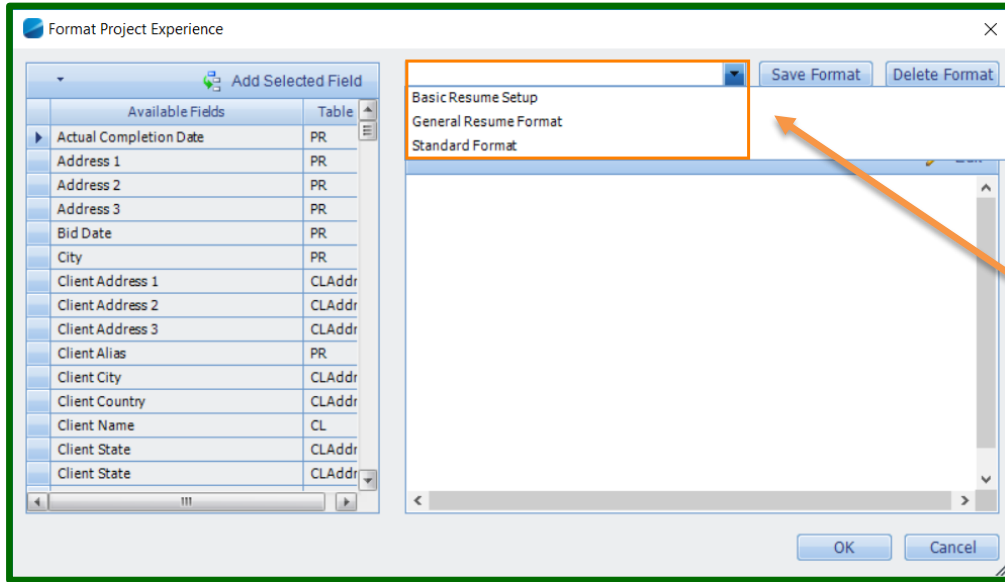
Building Resumes in Vision

- Use Relevant Search Criteria to Identify the Applicable Projects to Include
- The Order of the Projects Can Also Be Defined



Building Resumes in Vision

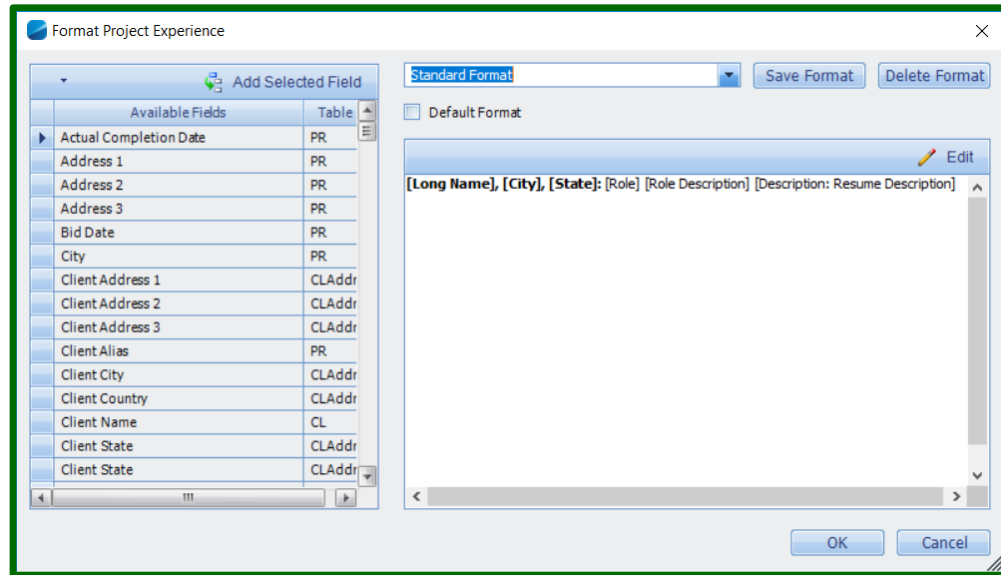
- Users Can Select Specific Fields to Include for Each Project
- Formats Can Also Be Saved for Later Use



Saved Formats

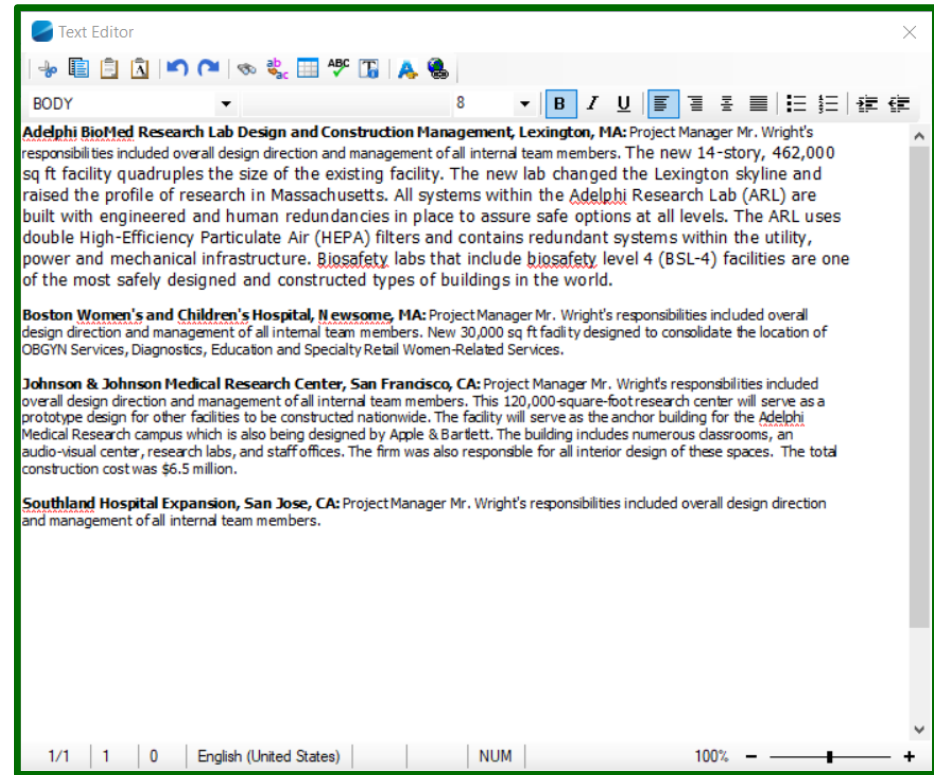
Building Resumes in Vision

- Formatting of the Fields Can Also be Added (Bold, etc.)
- Font Settings are Determined in the Merge Template



Building Resumes in Vision

- After Selecting 'OK' a Preview of the Project Text will be Displayed

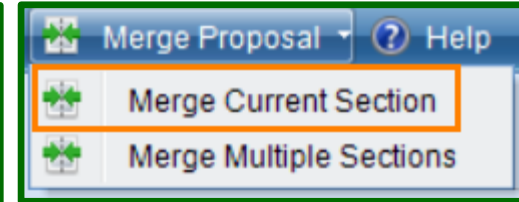


Building Resumes in Vision

- To Merge the Resume Select 'Merge Current Section' from the Merge Proposal Icon on the Custom Proposal Taskbar

Francis Lloyd Wright
Studio Director - Architectural Design

Education BArch/Architecture/University of Wisconsin - Madison/1984	Experience Adelphi BioMed Research Lab Design and Construction Management, Lexington, MA: Project Manager Mr. Wright's responsibilities included overall design direction and management of all internal team members. The new 14-story, 462,000 sq ft facility quadruples the size of the existing facility. The new lab changed the Lexington skyline and raised the profile of research in Massachusetts. All systems within the Adelphi Research Lab (ARL) are built with engineered and human redundancies in place to assure safe options at all levels. The ARL uses double High-Efficiency Particulate Air (HEPA) filters and contains redundant systems within the utility, power and mechanical infrastructure. Biosafety labs that include biosafety level 4 (BSL-4) facilities are one of the most safely designed and constructed types of buildings in the world.
Registrations Registered Architect/1988/Illinois #60-2569-7458	Boston Women's and Children's Hospital, Newsome, MA: Project Manager Mr. Wright's responsibilities included overall design direction and management of all internal team members. New 30,000 sq ft facility designed to consolidate the location of OBGYN Services, Diagnostics, Education and Specialty Retail Women-Related Services.



Building Proposals in Vantagepoint

- Vantagepoint 2.0 Does Not Allow for Merges Directly From Hubs (*Info Centers*)
- Custom Proposals is Available in Vantagepoint 2.0 (*CRM Required*)
- Resumes Can be Built in Vantagepoint Using the Same Data Used in Vision Examples

Building Resumes in Vantagepoint

- Add Hub Record Into 'Resumes' Section

The screenshot shows a dialog box titled "Add Hub Record" with the following elements:

- ADD RECORDS FROM ***: A dropdown menu with "Employees" selected.
- CHOOSE RECORDS (YOU CAN ADD MORE LATER, TOO) ***: A dropdown menu with "Frank Wright" selected and a close button (X).
- COMMON FIELDS (YOU CAN ADD MORE LATER, TOO)**: Two checked checkboxes for "Full Name" and "Title".
- How many images per record do you want?**: An empty text input field.
- Clear All**: A text link at the bottom left.
- Add**: A dark blue button at the bottom right.
- Cancel**: A light gray button at the bottom right.

Building Resumes in Vantagepoint

- Add Resume Text To the Record

Frank Wright

DESCRIPTION *

Bio - Introduction

TEXT

Fonts | Size | **A** | **B** | *I* | U | Styles | [Icons]

Mr. Wright is a world-renowned Architect and Interior Designer responsible for the design of more than 500 structures. A recognized leader in the Prairie School movement of architecture, he developed the concept of the Usonian home, his unique vision for urban planning in the United States.

Mr. Wright was recognized by the American Institute of Architects as "the greatest American architect of all time".

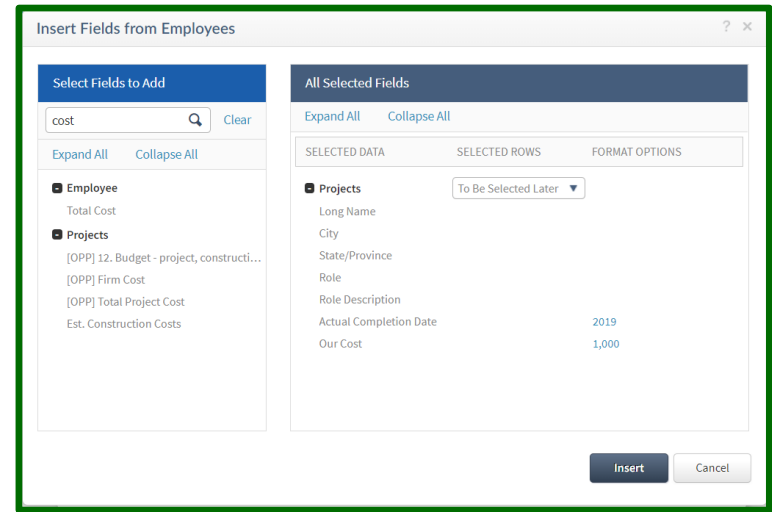
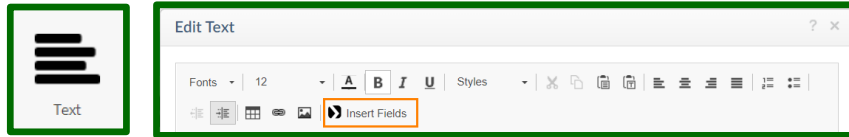
Changes made to the text will update the record in the hub. [Save & Update Records] [Cancel]

Resume Categories

*Consider using
'Standard' Resume
Categories for Bios
and Intro Paragraphs*

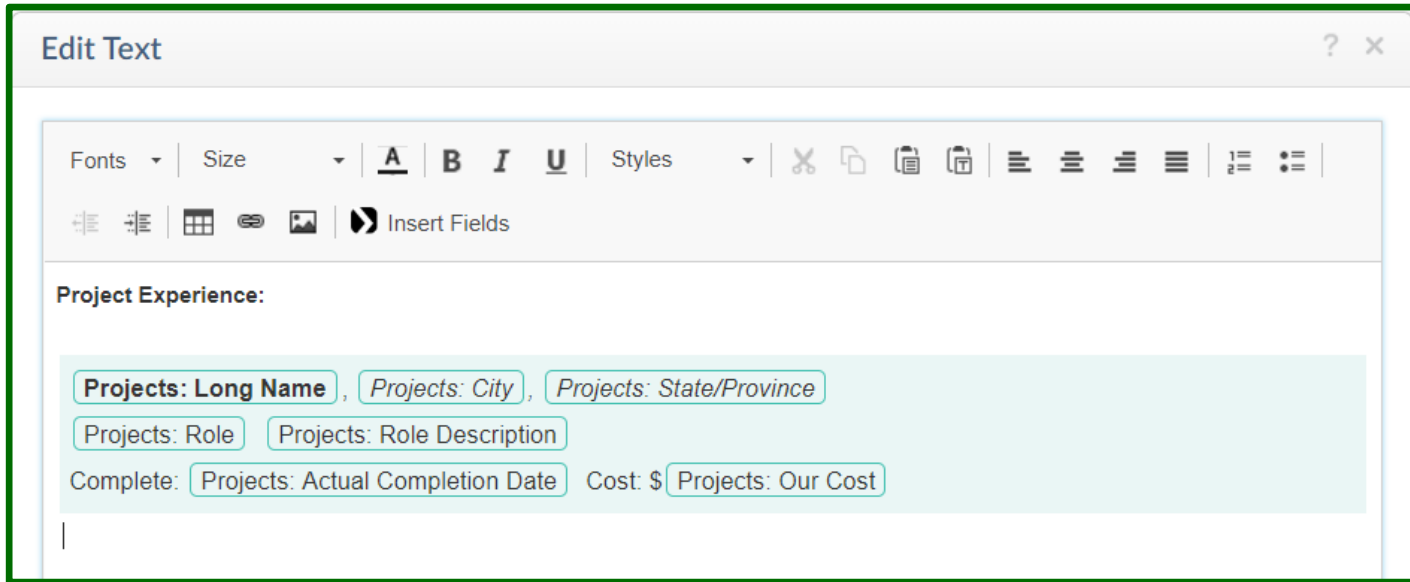
Building Resumes in Vantagepoint

- Add Project Experience to the Resume
 - Project Experience is added by Selecting the 'Text' General Element
 - Users Can Then Select Specific Fields to Include by Inserting Fields



Building Resumes in Vantagepoint

- Once Fields Are Selected You Can Format Within the Edit Text Dialog



Building Resumes in Vantagepoint

- Next You Will Need to Identify The Projects to Include for Each Employee Resume

Select Project Experience for Employees

Frank Wright

Frank Wright

Selected Projects

NUMBER	NAME	HOURS
There are no records to show in this grid.		

+ Add Projects

Building Resumes in Vantagepoint

- Use the Project Lookup to Identify the Projects to Include

The screenshot displays the 'Project Lookup' window. At the top, there is a search bar with 'Medical' entered. Below the search bar, there are buttons for 'Add a Field', 'Clear Search', and 'Save Options'. The search criteria are shown as 'Projects - Project Type = Medical'. A 'Show Preview' toggle is turned on. Below this, a table lists the search results:

PROJECT NUMBER	PROJECT NAME	HOURS
<input type="checkbox"/> 2003005.00	Adelphi Research Lab	
<input type="checkbox"/> 0010909.20	BWCH	
<input type="checkbox"/> 1999010.00	Johnson & Johnson Research Center	
<input type="checkbox"/> 0TEST12.56	Southland Hospital Expansion	

At the bottom of the window, there is a 'Show # of Results' link and 'Apply' and 'Cancel' buttons.

Building Resumes in Vantagepoint

Frank Wright
Studio Director - Architectural Design

Mr. Wright is a world-renowned Architect and Interior Designer responsible for the design of more than 500 structures. A recognized leader in the Prairie School movement of architecture, he developed the concept of the Usonian home, his unique vision for urban planning in the United States. Mr. Wright was recognized by the American Institute of Architects as "the greatest American architect of all time".

Project Experience:

Adelphi BioMed Research Lab Design and Construction Management, Lexington,
Project Manager
Mr. Wright's responsibilities included overall design direction and management of all internal team members.
Complete: 2009 **Cost:** \$75,000,000

Boston Women's and Children's Hospital, Newsome,
Project Manager
Mr. Wright's responsibilities included overall design direction and management of all internal team members.
Complete: 2018 **Cost:** \$16,500,000

NOTE: Vantagepoint Does Not Allow Users to Select Specific Project Description Categories on Resumes.

Consider creating a User-Defined Field for 'Resume Description' if you want to include a brief description of the Project in Addition to the Employee's specific Role Description.



Questions



Come See Us

Check out the sessions that our team will be presenting!

- 🍌 **VPVI-38** Adding UDF's & Workflows – Where Do You Start?
- 🍌 **VPVI-37** Transaction Center – Which Transaction Type Should I Use?
- 🍌 **VPVI-55** Don't Just Fly, Soar (Dumbo) – See How Vision Customization Can Work for You
- 🍌 **VPVI-56** The Magic of AP Approvals in Vantagepoint and Vision
- 🍌 **VPVI-87** Reduce Time & Expense Error & Delays
- 🍌 **VPVI-33** Simplifying Your Project Planning Process
- 🍌 **VPVI-42** Play Nice Together to be More Efficient and Effective in Our Roles
- 🍌 **VPVI-88** Leave the Imagination to Disney – Avoid Custom Invoices
- 🍌 **VPVI-18** Creating Actionable Vantagepoint Dashboards
- 🍌 **VPVI-89** Eliminate Spreadsheets & Harness the Power of User Defined Info Centers



Contact Information

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2. Utilize the Post-Event Toolkit to share what you've learned.
3. You can download Continuing Education credit information from your certificate hub link. The link is in the mobile app and will be emailed to you after the conference.

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- Online and mobile app access to this year's presentations expires on March 1, 2020.