



## DELTEK VISION DISCOVERY QUESTIONNAIRE

The purpose of the Deltek Vision Discovery Questionnaire is to help us understand your company, its people and its business needs; providing the requested information will help us develop a focused and relevant demonstration. Please answer applicable questions and be as descriptive as possible; for example, if you do not generate proposals, you can skip questions related to this topic. We encourage you to complete this questionnaire with others in your company to ensure the information is current, accurate and representative of your entire company.

### COMPANY INFORMATION

**Company Name:** \_\_\_\_\_

**Contact:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**City, State Zip:** \_\_\_\_\_

**Phone:** \_\_\_\_\_

**Fax:** \_\_\_\_\_

**Email:** \_\_\_\_\_



## DELTEK VISION DISCOVERY QUESTIONNAIRE

### COMPANY AND RESOURCES

**Please describe your company e.g. company history, locations, industries served, lines of business, etc.**

**What differentiates your company from its competitors?**

**What type of growth does your company expect to achieve in the next year? 5 years?**

**Does your company provide services for government agencies?**

**How many people does your company employ?**

**How many billable employees does your company employ?**

**Does your company use subcontracted labor?**

**Do employees work in the office? Remotely? In the field?**

**In addition to services, does your company sell products or maintain serialized inventory?**



## DELTEK VISION DISCOVERY QUESTIONNAIRE

### BUSINESS SYSTEMS

**Please describe your current system(s) for general accounting (general ledger, accounts payable, etc.).**

**Please describe your current system(s) for marketing and CRM (Customer Relationship Management).**

**Please describe your current system(s) for proposal generation.**

**Please describe your current system(s) for project and resource planning and project management.**

**How are the systems above integrated?**

**Are these systems based on a common technology or platform?**

**Do these systems share a common user interface?**

**Who within your company uses these systems and for what purpose?**

**How does your firm leverage other software packages such as MS-Excel or MS-Project with regard to managing your project information?**



## DELTEK VISION DISCOVERY QUESTIONNAIRE

### BUSINESS PROCESSES

**Please describe the current process for recording labor hours and expenses.**

**Please describe the current process for preparing billing invoices and the types of invoices prepared (e.g. hourly, time and materials with an upset limit, fixed-fee, lump sum, etc.).**

**Please describe the current process for managing accounts payable.**

**Please describe the current process for managing accounts receivable.**

**Please describe the current process for managing marketing campaigns and custom relationships.**

**Please describe the current process for managing proposal generation and tracking.**

**Please describe the current process for managing project budgets, resource assignments and employee utilization.**

**Please describe the current process for preparing reports related to the processes above.**



## DELTEK VISION DISCOVERY QUESTIONNAIRE

### INTEGRATING BUSINESS SYSTEMS AND BUSINESS PROCESSES

*When completing this section, think about how your company operates on a daily basis and how your systems help or hinder your operations. Do you enter data multiple times? Do you repeat processes? Is information readily available to the appropriate people? Etc.*

**Please evaluate how your current systems meet the needs of your company overall.**

**Please evaluate how your current systems meet the accounting needs of your company.**

**Please evaluate how your current systems meet the marketing and customer relationship management needs of your company.**

**Please evaluate how your current systems meet the proposal generation and tracking needs of your company.**

**Please evaluate how your current systems meet the budgeting, resource tracking and utilization optimization needs of your company.**

**Please evaluate how your current systems meet the reporting needs of your company.**



## **DELTEK VISION DISCOVERY QUESTIONNAIRE**

**Please fax to Forepoint LLC 206-299-2800**

**or mail to**

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Suite 460  
Seattle WA 98125**