This message platform is used as the basis for all forms of messaging by the PS business unit that explain our solutions and the problems they solve. The message platform is <u>not</u> customer-facing, but its content is used to ensure effective and consistent messages in all forms of customer-facing communications, including brochures, presentations, e-mails, webcasts, web copy, and other similar marketing or sales-support material.

The elements of this message platform are:

Wireframe (Bullets)

Summary Message (Narrative Summary)

1. Accurately Plan
2. Correctly Respond
3. Always Improve

   For each of these:
   - What is this (definition)?
   - What is the best practice?
   - Why is it so difficult today?
   - What happens instead? (front-line impact)
   - What's the business impact? (C-level issues)
   - What's needed to do this well?

Current State: Why is it Difficult to Change?

- Disconnected Data
- Inflexible Solutions

What's Needed? (Summary)

Our Solution

- Why Deltek?
- What is Deltek Maconomy?
- Why do PS organizations turn to Deltek Maconomy?

1. Complete Visibility
2. Total Control
3. Deep Insight

   For each of these:
   - What does it mean?
   - How does Deltek Maconomy provide this? (proof-points/mapped capabilities)
   - Customer Validation (client quotes)

Professional Services firms want more value from people, their work, and their time. This means **planning accurately** in plans of all kinds, **responding correctly** when plans need to change, and **continuously improving** processes. To do this, firms turn to Deltek Maconomy for **complete visibility** across the organization, **total control** over projects, and **deep insight** into the entire operation.

VISIONING STORY: MESSAGING OVERLAY

What is it you want?	Increase Revenue	Raise Profit	Grow the Firm
Which means maximum value from:	**People**	**Projects**	**Time**
What are your Key Success Factors?	1. Increase Utilization 2. Win New Business	3. Ensure Profitability	4. Improve Billability 5. Accelerate Cash Flow
How can you achieve these KSF?	**Accurately Plan**	**Correctly Respond**	**Always Improve**
Why is this difficult today?	• Unclear Status	• Unguided Decisions • Rigid Processes	• Unexplained Results
What happens instead?	• Inaccurate Estimates • Uneven Utilization	• Inconsistent Margin • Costly, Risky Inefficiency	• Administrative Expense • Failure to Change
What's the impact on the business?	• Inconsistent Capacity • Unhappy Employees • Dissatisfied Clients	• Inconsistent Profits • Unnecessary Risk	• Low Realization • Missed Opportunities • Uneven Growth
What is needed?	• Visibility across the entire organization	• Control over projects, resource decisions, time	• Insight into clients, resources, projects, processes, & results
Why can't you get this today?	Disconnected Data Inflexible Solutions	*Which leads to…* *Which leads to…*	Inaccurate Information Ineffective Workflow
What do we provide?	**Complete Visibility**	**Total Control**	**Deep Insight**
What does that mean? *(define each attribute)*	• Comprehensive • Connected • Current • Accessible	• Focused for PS • Synchronized • Intuitive • Easy	• Accurate • On-Demand • Linked • Infinite
How do we provide it?	• Unified Workspace • Flexible Views • On-Demand Information • Visible Skills & Talent	• Financial Control • Guided Workflow • Easy Extensions • Flexible Deployment	• Streamlined Information • On-Demand Dashboards • Deep Analytics
What are the C-level benefits?	• Satisfied Clients • Employee Retention	• Consistent Margin • Lower Risk	• Higher Realization • Predictable Growth
Why turn to Deltek?	Expertise	Focus	Scale

Professional Services firms of all kinds who want to increase revenue, raise profits, and grow the firm must continually maximize the value of people, projects, and time.

5 Key Success Factors. Five Key Success Factors identify how well Professional Services firms do this. The key to maximizing the value of **people** is *Winning New Business* so that work is sufficient to meet capacity, and *Increasing Utilization* so available capacity becomes billable work. All work must make money, so the key to maximizing the value of **projects** is *Consistent Profitability*. To maximize **time**, each worked hour must be converted to cash by *Improving Billability*, and the final key success factor is *Accelerating Cash Flow* so revenue covers obligations and enables expansion.

A Best-Practice Approach. Achieving the key success factors that will maximize the value of people, their work, and their time means PS providers of all kinds must **Accurately Plan** the best use of resources, **Correctly Respond** when project plans require change, and **Constantly Improve** so the business can grow.

- Planning Accurately. Accurate plans– in the form of proposals, projects, or budgets– require precise expectations about scope, duration, cost, or resources to reduce the likelihood of unplanned changes that impact expected results (profit, client satisfaction, revenue, etc.) But **accurate planning is difficult** because of **unclear status** across the organization. Instead, firms struggle with **inaccurate estimates** and **uneven utilization**. The net impact? **Inconsistent capacity**, **dissatisfied clients**, and **unhappy employees**. To plan better, firms need **visibility** across the entire organization.

- Responding Correctly. Correct responses mean appropriately adjusting project plans so results meet expectations, and adapting to external pressures like client demands or growth objectives such as expansion. But **responding correctly is difficult** because of **unguided decisions** by decision-makers at all levels, who make inappropriate adjustments based on inaccurate information, and **rigid processes** that can't adapt to client demands, regulatory changes, or new business models. Instead, firms struggle with **inconsistent margin** because of poor choices that eat into profit, and **costly, risky inefficiency** because of processes that couldn't adapt to change. The net impact? **Inconsistent profits** across clients, resources, & work, and **unnecessary risk** of regulatory non-compliance, client satisfaction, or unprofitable growth. To respond correctly, firms need **control** over projects, resourcing decisions, and time.

- Improving Always. Improving means discovering reasons behind unsatisfactory results, and making changes to gain more value from people, their work, and their time (along key success factors like utilization, margin, or cash flow.) But **continuous improvement is difficult** because of **unexplained results** that can't reveal why expectations were missed. Instead, firms struggle with unnecessarily high **administrative expense** from costly non-billable time to identify issues, and **failure to learn** from past mistakes or how to repeat successes. The net impact? **Low realization** from inefficient processes, **missed opportunities** to provide new services, and **unpredictable growth** through the current client, service, and resource portfolio. To always improve, firms need **deep insight** into clients, resources, projects, processes & results.

Today, Change is Difficult. Today, firms don't have the visibility, control, or insight they need. Plans are imprecise, responses are unguided, and information is unused because disconnected data across various stand-alone systems leads to **inaccurate information**, and inflexible solutions leads to **ineffective workflow**. Instead, disconnected stand-alone systems leave firms with an **incomplete view** of the entire enterprise. Data isn't shared across the unnatural boundaries of individual front-office & back-office systems, so **service delivery is disconnected from financial results**. Inflexible, outdated systems are difficult to modify, leaving firms to **error-prone, unstructured work-arounds**.

Turn to Deltek Maconomy. Professional Services firms of all kinds turn to Deltek Maconomy to maximize the value of people, their work, and their time. Deltek Maconomy is an enterprise resource planning solution that helps organizations **plan accurately** for the services they provide, **correctly respond** to business pressures, and **constantly improve** results so the business can grow. Three attributes distinguish Deltek Maconomy from any other solution:

- Complete Visibility. Only Deltek Maconomy establishes complete visibility of clients, projects, resources, and financials. Unlike narrow views of isolated information within disconnected systems, Deltek Maconomy's **Complete Visibility** is a *comprehensive view* of the entire organization, *entirely connected* & *always current* among clients, resources, work, and financial results, and *easily accessible* to anyone in the organization at any time. Instead of **unclear status**, PS organizations can *plan accurately*.

- Total Control. Only Deltek Maconomy brings the total control firms need to respond correctly when faced with changes driven by client requests, scope changes, new service offerings, new clients, or business expansion. Unlike disconnected environments that can't guide workflow across application boundaries, Deltek Maconomy's **Total Control** is *purposefully designed* for the unique Professional Services need to immediately convert time to cash, *synchronized* to instantly reflect the impact of any change

in project status, *transparent* so performance expectations are clear at all levels*, intuitive* to guide workflow through each phase of the project lifecycle, and *easy* to adapt when change is needed. <u>Instead of</u> **unguided decisions** & **rigid processes**, firms with total control can *respond correctly*

- Deep Insight. <u>Only</u> Deltek Maconomy develops **deep insight** into all areas of operations. <u>Unlike</u> disconnected point solutions that can't transform outdated, inconsistent, and unrelated data into knowledge, Deltek Maconomy's **Deep Insight** is *accurate* so it's trusted and constantly updated so it's *current*, available *on-demand* for users when & how they need it, *completely connected* so the information "tells a story" that explains the reasons behind results, and *infinite* so all users across the organization can ask– and answer– any question they may have. <u>Instead of</u> **unexplained results**, firms with deep insight can *constantly improve*.

Accurately Plan [Accurate Plans]

Accurate Planning of proposals, projects, or budgets means precise expectations about scope, duration, cost, or resources. Reducing or accounting for possible unplanned deviations increases the likelihood of desired results (profit, client satisfaction, revenue, etc. along Key Success Factors. Greater precision requires planners at all levels to consider relevant past results, current status, and projected activity across clients, projects, and finances.

What's the best practice?

Consider <u>all</u> Plans. Almost any PS activity is based on some type of plan: new-business proposals, resource plans, project plans, financial budgets, an employee's weekly work plan.

Deeper, Wider, Up-to-Date. More information– like constraints & dependencies, or past results– makes plans more accurate. The most accurate plans consider multiple constraints (like *talent & experience*, along with availability,) and wider dependencies (like *forecasted workload* in addition to current capacity,) and are based on <u>current</u> status in each area. Status changes constantly, so plans must be promptly & easily updated so they *stay* accurate.

<u>Consider Deeper</u>: What if a resource planner could see not only who's available today, but also if they have the right experience?

<u>Consider Wider</u>: What if the financial results of past work for similar clients & similar scope could be leveraged in writing a new proposal?

<u>Consider Current</u>: What if expected workload, based on current proposals, was available to resource planners?

Deltek Recommends: To develop more accurate plans, planners at all levels must leverage more information in developing every kind of plan. Provide *quick access* to relevant, up-to-date *information across the entire organization*– about clients, proposed work, work-in-process, resources, or financials. Ensure plans are *easily updated* as status changes.

Why are accurate plans so difficult today?

Unclear status of projects & resources leads to inaccurate plans. Planners at all levels don't have easy access to relevant information, and can't leverage it to make plans as accurate or complete as they could be.

What happens instead? (operations/tactical issues)

Inaccurate Estimates. Planners estimate expectations based on experience and judgment. Estimates (and plans) are inaccurate.

▼ *Talent & experience* isn't used in resource planning– projects aren't always staffed with the most appropriate resources.

▼ Planners *can't see past work*, or know if a given task typically takes longer than expected. They under-estimate time required, which leads to missed deadlines.

▼ Business development managers often use *incorrect rates* in firms where rates vary for resources shared across geographies or service lines– which leads to under-estimated internal cost.

Uneven Utilization. Projects require reactive resourcing decisions to address unplanned issues resulting from inaccurate plans.

▼ *Over-use of resources* who must "fight fires," as new work comes in, or are just over-booked by planners who hide resources in order to constantly rely on a favorite resource.

▼ *Hidden capacity* of under-utilized resources which can't be easily identified"– even work is available for them– because planners can't see across departments to access resources they don't "own."

▼ *Sub-contractors* are used unnecessarily, which reduces project profit margin.

What's the impact on the business? (C-level issues)

- **Inconsistent Capacity**. Constant dips & spikes in utilization leave planners with an unclear picture of actual or available capacity.

- **Unhappy Employees**. Unpredictable workload creates a poor work environment; inconsistent utilization puts incentives at risk.

- **Dissatisfied Clients**. Missed deadlines, unexpected costs, & inconsistent results put future revenue at risk.

Visibility across the entire organization:

- Past Work (scope, resources used, results)
- Project WIP, Plans, & Proposals
- Resources (capacity, talent, skills, experience)
- Financial Results

Correctly Respond [Correct Responses]

Responding Correctly is about making appropriate adjustments to projects so that results meet expectations, and adapting the organization to external pressures like client demands or growth objectives like expansion or acquisitions.

What's the best practice?

Control Constant Change. PS organizations must have *control over constant change*– like new client demands, changes in scope, inconsistent resource availability, service-line or geographic expansion, acquisition, or regulatory changes. To control profitable results, PS organizations must:

      A. Correctly <u>adjust</u> during the project lifecycle   B. Appropriately <u>adapt</u> the organization.

Adjust Properly– Guide Decisions. Unforeseen events– like changes in scope, timelines, or resource availability– mean adjustments to even the most accurate plans. At any point in the project lifecycle, decision-makers at all levels must identify issues, <u>decide</u> what to change, and how to manage the change. Ensuring results– client satisfaction, expected margin, anticipated revenue, etc.– means decision-makers must know:

- Current status compared to expectations (like current margin vs. expected margin)
- Root causes behind the issue (like if a higher-cost resource used, scope changed)
- Relevant information (about the proposal, past work for the client, payment history, etc.)

  <u>Consider Status, Root Causes, Relevant Information</u>: A project manager facing a delay– who could easily see that a junior (less skilled) resource took more time than expected, that the client has a long history of profitable work, that a senior resource is available, and that current margin could absorb the additional internal expense– is guided to the best decision (adding the senior resource to the project.)

Adapt Appropriately– Be Flexible. PS organizations must control <u>external pressures</u>– like a client request for a new invoicing process or a regulatory policy that changes an accounting rule– and <u>growth objectives</u>– like new service offerings, global expansion, or acquisitions. *Rigid* PS organizations that adapt poorly to external pressures and slowly to internal pressures face inefficient workflow, costly expense, & greater risk– and can't capitalize on growth opportunities.

- *Flexible* PS organizations react quickly to external demands, and maximize the value of internal demands.

  <u>Consider Flexible PS Organizations</u>: A key client demands separate invoices billed separately to each of their unique business units, with task-level detail for one and a summary for the other. Where rigid billing process and inflexible invoices would lead to error-prone manual preparation, the flexible PS organization can easily modify both the invoice and the workflow to ensure the client's business units are each invoiced appropriately.

Deltek Recommends: To respond in the face of constant change, PS organizations must be able to correctly adjust throughout the project lifecycle, & appropriately adapt the organization.

To adjust projects, control decisions at all levels. Set clear expectations for Key Success Factors, and provide decision-makers with easy access to current status in each area– constantly updated against WIP over the duration of the project. Enable easy access to a holistic view of key decision-making criteria across the entire organization (proposed work, current work, past work, clients, financials, resources.) Guide decision-makers to appropriate options & choices, prompt critical steps within the workflow, and develop ways to analyze root-causes behind problems, and the impact of final decisions.

To adapt the organization, gain control over external pressures and growth objectives by ensuring workflow, organization structures, financial models, and business processes can be easily and quickly modified in response.

Why are correct responses so difficult today?

Unguided decisions by decision-makers at all levels, who make inappropriate adjustments based on inaccurate, outdated, or incomplete information.

Rigid processes can't easily adapt to client demands, regulatory changes, or new business models. Organizations are forced into inefficient, costly, and error-prone work-arounds.

What happens instead? (operations/tactical issues)

Inconsistent Margin. Some projects meet expectations, yet others are unprofitable or less profitable than expected. PS organizations can't determine project profitability until after-the-fact – forcing all levels to "hope for the best" on each project.

▼ *Failing to act.* Project managers fail to make adjustments because they can't see if current WIP is meeting margin expectations. Actual margin is unknown until after projects conclude and results are 'in the books"– when it's too late to make adjustments.

▼ *Choosing poorly.* Project managers can't see relationships among clients, projects, resources, or finance, so inappropriate decisions drag down margin (like using sub-contractors when internal resources are available, or doing additional work for a past-due account.)

▼ *Losing time.* Resources fail to post time quickly and forget what they worked on or for which client– leading to "lost time" that can't be billed. Time incorrectly posted to the wrong project/task leads to disputed invoices and write-offs.

Costly & Risky Inefficiency. Adapting to external pressures and internal objectives is inefficient– which adds cost that drags down profits and slows growth, and risks client satisfaction or regulatory compliance.

▼ *Work-arounds & manual steps.* Processes that don't adapt quickly and easily lead to work-arounds and manual steps. A client demand for new task-level invoicing may result in complex, time-consuming reports for projects managers and manual Excel invoices for finance. Opening or on-boarding an office in a new geography may mean accounting & invoicing in tools like Excel.

▼ *Inconsistency.* Manual work-arounds at any level in any department lead to undisciplined individual approaches. Distinctly different invoices may confuse clients, or unique interpretation of accounting rules may jeopardize compliance.

What's the impact on the business? (C-level issues)

● **Inconsistent Profits**: In all areas, profits fail to meet expectations. (unprofitable people, work, clients, services.)

● **Unnecessary Risk**: External pressures and internal objectives jeopardize client satisfaction, compliance, or growth plans.

What is needed to Correctly Respond?

Control over Project Commitments, Resourcing Decisions, Billable Time. Control over external pressures & internal objectives.

Always Improve [Constant Improvement]

To **Always Improve** means gaining increasingly more value from your people, their work, and their time. To continuously improve across key success factors (like utilization, profitability, cash flow & growth) PS organizations must constantly discover the reasons behind unsatisfactory results, perpetually modify workflow & structure, and continually evaluate the results.

What's the best practice?

Information for Everyone. The entire organization must contribute to continuous improvement. Information is the basis for improvement, so relevant information must be easily accessible to all levels of responsibility, across all areas of the organization.

Consider Relevance: A senior executive could study the overall profitability of an entire business unit, or its staff accountant could isolate which type of its projects are typically late.

Consider Accessibility: Accessible information is available on-demand, structured to answer highly-repeatable, common questions– and is also easily modified to answer specific questions or comply to individual preferences.

Trust in the Numbers. Trusted information brings certainty to what's not working, and confidence in what to change– so eliminate data conflicts and make sure information is current.

Consider Trust: A team of project managers meets for a weekly progress review, each with consistent resource availability information, based on the most recent time registrations posted at the moment the reports automatically executed.

Knowledge– Not Just Data. Data across all areas of the organization must be transformed into relevant knowledge for all levels. Knowledge is gained by *linking actions to outcomes*– so put data in a context to "tell the story" with a complete picture.

Consider A Complete Picture: A financial analyst, looking for reasons behind low margin, has information that links clients, business units, departments, project types, tasks or activities, and can view virtually unlimited relationships to help reveal the root cause.

Moderate Changes. Continuous improvement identifies small issues before they become large problems, so corrections are moderate and easily managed. Make moderate adjustments that avoid harsh change-management, and are easily implemented for quick ROI.

Consider Moderate Change: Analysis of billability issues reveals that manager-approval is needed for time registrations on certain types of work. Instead a complete replacement, the current time-&-expense workflow is quickly adapted with a simple scenario-driven approval rule.

Deltek Recommends: Develop key performance indicators that are visible across the organization, so all levels can identify where improvement is needed. Gain trust in the numbers by consolidating information so that it's consistent & current. Establish connections among all data and workflow across the entire organization– linking front-office activity among clients, resources, work with back-office financial results– so the relationships "tell a story," and data can become knowledge. Encourage widespread participation in continuous improvement by making information easily accessible, and easily interpreted– so all levels can ask & answer their own questions, and take decisive action. Avoid long & costly rip-and-replace approaches by ensuring that workflow processes and organizational structure can be easily & moderately modified, so corrective improvements bring quick value.

Unexplained results can't reveal *why* expectations are missed. Managers at all levels lack insight, because untrusted and inconsistent data fails to become meaningful knowledge.

What happens instead? (operations/tactical issues)

Administrative Expense. PS organizations face costly administrative expense and non-billable time to identify and correct issues.

▼ *Wasted time*. Finding answers means combining data from across the organization, resolving conflicts, and then developing reports specific to the question– a process that repeats for each new set of questions.

▼ *Costly and time-consuming modifications* to existing workflow processes discourage organizations from making necessary adjustments.

Failure to Change. PS organizations stay locked in the same processes, which lead to the same results.

▼ *Learning from mistakes* is difficult, because decisions are disconnected from results, so the "real reasons" that led to poor utilization, low margin, or non-billable time remain hidden. Instead, managers rely on "best guesses" and "gut feel."

▼ *Planning for growth* is difficult. Unless separate sets of information about past work, present WIP, proposed work, and financial results are combined, its' challenging to see if other clients need similar services, if resources can be shared across service lines, or consistently unprofitable services should be eliminated.

What's the impact on the business? (C-level issues)

- **Low Realization**. Inefficient and error-prone processes that result in invoicing errors or lost time mean total billable capacity isn't completely converted into revenue– reducing cash flow and lowering profits.

- **Missed Opportunities**. Organizations fail to recognize opportunities to sell similar services to like clients, can't identify opportunities for new services, and forego the cost-savings and associated competitive advantages of reduced administrative expense.

- **Unpredictable Growth**. Organizations can't identify the combinations of clients, activities, and resources that are consistently profitable, so steady profitable growth is elusive.

What is needed to Constantly Improve?

Insight into clients, resources, projects, workflow processes, and results.

Why Is Difficult To Change? [Current Environment]

PS organizations seeking to plan accurately, respond correctly, and improve continuously are held back by unclear status, unguided decisions, rigid processes, and unexplained results. Yet in the current environment, *inaccurate information* and *ineffective workflow* can't bring the visibility, control, and knowledge that leads to best practices for achieving any of the key success factors.

The problem is that it's difficult to make existing systems more accurate and more efficient. Why? Consider:

Disconnected data makes information inaccurate, and current inflexible solutions make workflow inefficient, so plans are inaccurate, responses are unguided, and information is unused.

Today You Have… **Disconnected Data**	*Which Leads To…* **Inaccurate Information**	*So You Can't…* **Plan, Respond, Learn**
• You have **stand-alone project management tools**. Project-management tools (like Microsoft Project or Excel) are disconnected islands of resource & workload plans that aren't easily integrated to other systems (like CRM or HR.) Each plan is tied to a specific project, and formats are widely inconsistent. Only project managers & resource planners have access– others can receive an e-mail copy of the file.	▶ Which leads to an **incomplete view**. A complete, enterprise-wide view of proposed work, WIP, capacity, & talent is impossible: Current & available capacity is "locked away" among a few planners. Attributes like skills & experience (from HRM) can't be used in planning. With only project-level views, a complete "roll-up" of all resources is nearly impossible. Available capacity fails to stay current with proposed work.	▶ Ask Yourself: How many resource planning approaches are used in your firm today? ▶ Imagine: Just trying to confirm resource availability so you can commit timelines in a new-business proposal… ▶ How can you **plan accurately** when you have **disconnected data**?.

Today You Have… **Disconnected Data**	*Which Leads To…* **Inaccurate Information**	*So You Can't…* **Plan, Respond, Learn**
• You have **redundant information**. Individual stand-alone systems are installed for specific business functions as firms grow. Other systems are added through acquisition are also often kept so the firm can maintain local work processes, languages, or local financial/regulatory policies. Without complex, costly, and risky integration, each of these is a separate, stand-alone information silo.	▸ Which leads to **conflicting data**. Information is unreliable and not trusted to provide insight into the organization. Systems are unsynchronized, so data entered or edited in one place is inconsistent across all other systems. With conflicting reports, PS organizations face unproductive meetings, phone calls, or e-mail to resolve "multiple versions of the truth." It's difficult to create a single set of reporting data, so infrequent analysis reveals little insight.	▸ Ask Yourself: How many of your systems store client information? ▸ Imagine: Trying to determine average profit for a common task– across every location over the past 24 months. ▸ How can you **continuously improve** when you have **disconnected data?**

Today You Have… **Inflexible Solutions**	*Which Leads To…* **Ineffective Workflow**	*So You Can't…* **Plan, Respond, Learn**
• You have: **unnatural workflow boundaries**. For a growing firm with increasingly complex projects, workflow is increasingly collaborative across the entire organization, from front-office to back office. Yet data is easily not shared across individual stand-alone systems. These information boundaries mean workflow can't easily be linked among people, projects, time, or financial results.	▸ Which leads to **service delivery disconnected from financial results**. Workflow can't be linked among various systems to maintain the complete context of the plan to the WIP to the expected results. Service delivery (front-office) is disconnected from financial results (back-office,) so the impact of decisions aren't known until after-the-fact. Decisions unguided by strong financial control lead to low Utilization, Profitability, Billability, & Cash Flow (KSF.)	▸ Ask Yourself: Are the financial results you *want* driving the workflow you *need*? Or is the only workflow you *have* driving the results you've *got*? ▸ Imagine: How hard would it be to prevent PM's from taking on additional work from past-due client accounts? ▸ How can you **respond correctly** when you have **inflexible solutions**?
• You have: **rigid & inflexible systems** that are difficult to modify. Outdated technology means even moderate changes require customization, increasing maintenance expense while version-locking the organization against upgrades– or forcing expensive migration. Complex, proprietary toolkits mean that even moderate customization requires vendor assistance– which takes time & adds expense.	▸ Which leads to **work-arounds** & **errors**. Without an easy way to adapt workflow to external pressures and internal objectives, all levels are forced into inefficient & risky manual steps. Re-keying information is error-prone, and desktop tools like Excel or Word have can't alert users of errors, or provide managers with shared access or audit trails to ensure processes are being followed.	▸ Ask Yourself: How difficult would it be to address a client's request to invoice at a deeper level of the WBS? ▸ Imagine: How much time you'd lose over disputed invoices– if managers needed to produce them manually in Excel or Word? ▸ How can you **respond correctly** when you have **inflexible solutions**?

What's Needed? [Summary]

PS organizations that want to maximize the value of people, projects, and time need to **Accurately Plan** the best use of resources, **Correctly Respond** to adjust project plans and adapt the business, and **Constantly Improve** so the business can grow.

Yet today, PS organizations of all kinds face **unclear status, unguided decisions**, **rigid processes**, and **unexplained results**. The current environment makes it difficult to fix these issues, because today's **disconnected data** results in **inaccurate information**, and today's **inflexible solutions** lead to **ineffective workflow**.

Addressing these challenges requires:

- **Visibility**. To plan accurately, PSO need **visibility** into resources (capacity, talent, skills, experience), work (proposed & in-process,) and financial results across the entire enterprise. .

- **Control**. To respond correctly to new business, changes in project scope, client demands, new service offerings or business expansion, PSO need **control** to adjust the project lifecycle, and to adapt the organization..

- **Insight**. To continuously improve, PSO need **insight** into clients, resources, projects, workflow processes, and results.

Our Solution

Why Deltek?

Deltek's *expertise, focus,* and *scale* stand apart among providers of enterprise planning solutions for PS organizations.

- *Expertise*. <u>Unlike</u> providers who "learn on the job," Deltek's *2+ decades of experience* serving all types of professional services organizations across the globe has built deep expertise for delivering solutions that streamline professional services operations, address critical business issues, and improve performance in key success factors. These proven best practices are found among our team, throughout our processes, and within our solutions.

- *Focus*. <u>Unlike</u> providers whose attention & resources must be diluted across multiple solutions developed for unrelated disparate industries, *Professional Services organizations are Deltek's exclusive focus*. Solutions are purposefully designed for the unique needs of professional services organizations who seek to maximize the value of people, their work, and their time.

- *Scale*. <u>Unlike</u> small organizations with limited resources & questionable financial durability, or local providers locked within a single geography, Deltek brings the *scale, resources, and financial transparency* of a worldwide, publicly-held organization. Local presence brings individual attention to each location, yet global scale provides comprehensive support for worldwide PS enterprises. Our financial health, global resources, and employee strength are proudly revealed as a matter of public record.

What is Deltek Maconomy?

Deltek Maconomy is an enterprise resource planning solution that helps professionals services organizations **plan accurately** for the services they provide, **correctly respond** to business pressures, and **constantly improve** results so the business can grow.

Why do PS organizations turn to Deltek Maconomy?

Accounting firms, advertising & marketing agencies, and management consultancies turn to Deltek Maconomy to maximize the value of people, their work, and their time. For professional services organizations like these, Deltek Maconomy improves performance along their *key success factors*: To win more business, increase utilization, raise profits, improve billability, and accelerate cash flow.

Why is Deltek Maconomy different? What can Deltek Maconomy offer than no other solution can provide?

Three (3) primary differentiators distinguish Deltek Maconomy from other any other solution.

1. **Complete Visibility**. <u>Only</u> Deltek Maconomy establishes **complete visibility** of clients, projects, resources, and financials so firms can *plan accurately*.

2. **Total Control**. <u>Only</u> Deltek Maconomy brings the **total control** firms need to *respond correctly* when faced with changes driven by client requests, scope changes, new service offerings, new clients, or business expansion.

3. **Deep Insight**. <u>Only</u> Deltek Maconomy develops **deep insight** into all areas of operations, so firms *constantly improve* results.

Comprehensive capabilities mapped to each differentiator validate Deltek's claim that <u>only</u> Deltek Maconomy delivers the *most* complete visibility, the *most* total control, and the *deepest* insight.

1. Complete Visibility   *Now you can plan accurately.*

Only Deltek Maconomy establishes **complete visibility** of clients, projects, resources, and financials.

<u>Instead of</u> the **unclear status** faced by PS organizations today, firms with complete visibility can *plan accurately*.

What does it mean to have <u>complete</u> visibility?

Complete visibility is an appropriate, current view of past activity, planned work, WIP status, and forecasted results– across the entire organization. **Unlike** narrow views of isolated information within disconnected systems, Deltek Maconomy's Complete Visibility is:

- *Comprehensive*. The entire organization– top-to-bottom, and in all locations– across all phases of the project-delivery lifecycle (proposals, plans, projects, financial results) is appropriately included in the view.

- *Entirely Connected*. All relationships among clients, resources, work, and financial results are visible– and continuously updated as work is proposed, planned, delivered, and realized.

- *Always Current*. Views of actual results (past work & current WIP) and projected results (proposals, plans, & budgets) are continually updated as relationships among clients, resources, work, and financial results change during the project lifecycle.

- *Easily Accessible*. Status views align to the user's role & preferences (static reports and interactive dashboards), and are always accessible when needed (published or on-demand.)

How does Deltek Maconomy deliver Complete Visibility?

Capabilities like a **unified workspace**, **flexible views**, **on-demand information**, and **visible skills & talent** set Deltek Maconomy apart as the most superior approach to Complete Visibility.

1. Unified Workspace (single platform, one database)
Status is always current– so you know it's always accurate.

Better Than:	Specific "point" solutions for individual business areas– or distinct, non-integrated "modules"– are disconnected data islands that place unnatural boundaries among information. Viewing related areas of the business (such as proposed work and resource capacity) is cumbersome for users who have to traverse multiple systems, and complicated for IT– who has to maintain these systems. Worse, data isn't synchronized– so status that changes in one area (like registered time) fails to update other (project progress or billable work.) Without complex & fragile integration, information is inaccurate.
We Provide:	**Unified Workspace**. Information across the firm is joined into a single workspace, seamless and without boundaries among related data. Relationships among critical information– clients, proposals, resources, projects, time & financials– are perpetually connected, so they're always synchronized. Changes in one area (like registered time) instantly update all relationships (like project progress,) so current status is always accurate.
So You Can:	All types of planners now have a comprehensive view of the entire organization's past work, its current status, and projected results– current as of the latest change made to any phase of all projects.
Just Think:	A business-development manager proposing new work for an existing client can see, all in single workspace, the past work and its results, who did the work and if they're currently available, what else is currently proposed, and even the client's current account status.

2. Flexible Views
See the organization's status in any way you need.

Better Than:	Outdated basic accounting systems (like QuickBooks,) singular "point" solutions (like MS Project,) and unfocused generic ERP solutions (like NetSuite or MS Dynamics) have few perspectives of the organization (a single "lens," such as just a projects view, or just a client view)– which means a singular context, only one way to see the information. Gaining a different perspective means accessing another system– or, can't be done at all without complicated reporting.
We Provide:	**Flexible Views**. Relationships established among multiple "dimensions" of client, project, organization, and financial information– a dozen different lenses, or a nearly limitless combinations within the dozen dimension– are automatically applied to any transaction (like assigning resources, registering time, creating tasks, etc.) at any phase in the project lifecycle. Users can adapt workspace views "on-the-fly" through filters that toggle views on-demand from one perspective to another.
So You Can:	The immediate impact of a transaction is instantly visible to planners of all types– through any of the nearly limitless number of combinations they may need for an appropriate view the organization's status.
Just Think:	You can choose practically any way to view the organization– and no matter which way you choose, the status is accurate at that instant. *An employee registers time to a task: You can see all other employees who've registered time to the task, all like tasks across all projects, uncollected revenue on all tasks, all clients who've had the same task in the past…..*

3. On-Demand Information
Information at your fingertips– where & when you need it.

Better Than:	Singular "point" solutions (like MS Project or MS Excel) have no reporting capability at all. Outdated basic accounting systems (like QuickBooks) have few options for viewing information– typically only predefined static reports. The data is offline and not "live," so reports are outdated the moment they're produced– leaving inaccurate , unreliable information. Users abandon rigid reports that they can't modify to answer their questions. Outdated systems lack the advanced technology needed to push (publish) information to external communications like e-mail or mobile devices.
We Provide:	**On-Demand Information**. Relevant status information is pushed to planners of all types, at all levels across the entire organization, and is accessible on-demand. Web-accessible dashboards tailored to each role deliver visual status of projects & financial results– each view updated instantly as status changes. Reports are easily modified on-the-fly to adapt to users' needs & preferences, and all data is updated the instant the report is produced, so information is current. Scheduled reports published via e-mail, along with dashboard views, are accessible via the web or mobile devices.
So You Can:	Information at everyone's fingertips transforms all levels of the organization from reactive responders to proactive planners. Any user can cue current status, at practically any level of detail, and modify the view as needed– to guide or adjust plans. Managers can push relevant status information on-demand or schedule routine delivery to the recipients' ideal access point (web, e-mail, mobile.)
Just Think:	A weekly status meeting to review & reconcile project status is replaced by a personalized report automatically e-mailed daily to all project managers, containing each manager's project status, current to the most recent time registration at the moment the report was produced.

4. Visible Skills & Talent
Deeper information brings you more accurate plans.

Better Than:	Resource planning in current systems is too basic– primarily based on current workload (and rarely, including planned workload.) Valuable attributes like experience or expertise can't be used in resource selection because disconnected systems can't access past work, identify who did the work, or the financial success of the results.
We Provide:	**Visible Skills & Talent**. Deltek Maconomy uses each transaction of completed work to continually refine the relationship of a resource to their work, the clients served, and the results– incrementally increasing the accuracy of the expected effectiveness of each resource. An unlimited number of attributes, like experience, effectiveness, special skills, etc., can be associated with each resource.
So You Can:	Planners at all levels can identify resources by attributes such as skill (like a language,) certification, or experience (past work on a special type of project). Planners can quickly match appropriate resources to the specifications of proposals, and use attributes like experience & effectiveness to accurately estimate the hours required for various project tasks.
Just Think:	A project manager who could formerly only select resources based on their available capacity can now incorporate other attributes– quickly selecting a German-speaking resource, with a specific software skill, also with previous similar design experience, who typically stays within budget expectations, for a fixed-price project in Germany.

What are the C-Level benefits of Complete Visibility?

Complete Visibility provides **accurate status** across the organization, so firms of all kinds develop more **accurate plans** in all areas of the organization, from proposals to projects to budgets.   Firms eliminate the client-satisfaction and employee retention issues resulting from inconsistent capacity. <u>KSF</u>: Firms **Win More Business** and drive **Consistent Utilization**.

How do clients benefit from Deltek Maconomy's Complete Visibility?

TNS	"Maconomy can optimize our workflows and consolidate our financial data across the entire organization."
Profero	"The system will be managed locally but there will still be complete visibility through the one system."
Red Brick Road	"All our client and job data are maintained in one place. This minimizes redundant information and the risk of errors."
Devoteam	"All data automatically flow from each subsidiary to the parent company using strong Maconomy back-office functionality."
BBH	"Maconomy gives us more comprehensive visibility into client resource requirements, speeding our ability to track and project profitability at both a client- and company-wide level."

2. Total Control
Now you can respond correctly.

Only Deltek Maconomy establishes **total control** of the entire project lifecycle.

<u>Instead of</u> **unguided decisions** & **rigid processes** faced by PS organizations today, firms with total control can *respond correctly*.

What does it mean to have <u>total</u> control?

Total Control ensures that project lifecycle adjustments at any phase are guided by financial discipline, and the organization can constantly adapt in response to external pressures or to enable growth objectives. **<u>Unlike</u>** disconnected environments that can't guide workflow across application boundaries, Total Control in Deltek Maconomy is:

- *Targeted*.   The model that connects front-office project activity with back-office financial results is purposefully designed for professional services organizations' unique need to immediately convert capacity (time) to cash (billable receivables.)

- *Synchronized*.   Relationships across the entire project lifecycle are constantly connected, and instantly reflect the impact of any change in project status made at any point, by any level of the organization.

- *Clear*.   In each area of the organization, performance expectations for each Key Success Factor are appropriately visible at all levels– along with current status compared to expectations.

- *Proactive*.   Guided workflow across each phase of the project lifecycle prompt users for mandatory information, and through required processes. At the instant forecasted results fall short of expectations, notifications alert all levels that adjustments are necessary.

- *Easy*.   A modular architecture is the ideal foundation to easily expand capabilities or usage over time, and flexible technology quickly adapts when workflow processes need to change.

How does Deltek Maconomy deliver Total Control?

Capabilities like a **financial control**, **guided workflow**, **easy extensions**, and **flexible deployment** set Deltek Maconomy apart as the most superior approach to Total Control.

1. Financial Control (front office / back office)   *Keep project margin within expectations.*

Better Than:	"Point" solutions (like MS Project,) and outdated finance department tools (like QuickBooks,) make it difficult to set financial expectations, because there's no way to know if they're being met or missed. Systems like these cannot link financial control with project control because of unnatural boundaries between financial expectations and actual project activity. Disconnected systems can't establish a real-time relationship between a project transaction (like time registration, additional scope, resource replacement) and expected results (project budget,) so the transaction's immediate impact is hidden. Even if a project budget exists, there's no way to see if the project is making expected margin. Results aren't known until after-the-fact.
We Provide:	Content to be Added.
So You Can:	Content to be Added.
Just Think:	<TBA>

2. Guided Workflow   *Direct users to the best decisions.*

Better Than:	Disconnected systems mean duplicate data must be re-keyed at each application boundary, introducing inefficiency and risk at each point. Worse, workflow has no context across application boundaries, because relationships don't exist among clients in one system, projects in another, or resources, proposed work and actual results each in yet another separate system. Users can't be guided through the workflow, because certain conditions– like a certain client type inputted into a proposal– can't be linked to prompt required actions– like a credit-control check by finance.
We Provide:	Content to be Added.
So You Can:	Content to be Added.
Just Think:	<TBA>

3. Easy Extensions   *Adapt easily & quickly.*

Better Than:	Outdated technology is expensive to maintain, and inflexible, hard-coded design means you can't easily modify workflows without risky custom code, or integrate the data and processes of newly-acquired entities without complex integration. Most point solutions were never intended for enterprisewide integration, and have only one language, one currency, and one set of accounting standards– unsuitable for international expansion. Modifying these leaves you unappealing choices of complex custom interfaces, manual work-arounds, heavy reliance on the vendor, or acquiring more applications to support new business units.
We Provide:	**Easy Extensions**. Quick and simple <u>configuration</u> is made in an *extension framework* that doesn't customize the underlying source code. Internal IT resources can make extensive changes like workflow modifications or entirely new processes using a common, industry-standard Java language– while straightforward adjustments (like new workspace layouts or menus, or updated roles or user profiles) are simple updates to system settings. Corporate branding or even individual color schemes are adopted throughout with just a preference setting. Dashboards are modified to role & user preferences by simply selecting appropriate content from a list of available widgets, and reports can be tailored easily to user preferences or built quickly "from scratch" or by using existing templates as a baseline. The financial model easily on-boards new entities, and multiple accounting policies simultaneously comply with both local and overall corporate financial reporting requirements.
So You Can:	PS organizations aren't "version-locked" by customization to source code, so they can continually migrate to the latest release– without losing individual configuration or putting support at risk. Industry-standard approaches and simple configuration empowers internal resources to adapt when & how they need to– without relying on any vendor. Deep personalization drives users to widespread adoption essential for complete control. Organizations can adapt to external pressures– like modifying an invoicing workflow based on a client request– and internal objectives– like new accounting policies resulting from geographic expansion.
Just Think:	A newly purchased entity in a new geography has special invoicing processes for key customers. The new organization can be easily on-boarded into a single, enterprisewide system yet still maintain the workflow rules to ensure key clients are always invoiced appropriately per their required preferences.

4. Flexible Deployment
Align your investment to your objectives.

Better Than:	Back-office financial systems with only a single accounting model don't expand across borders, and individual "point" solutions are limited to a single focus (like accounting, project management, HR or business-development.) Expanding globally or adding capabilities means the additional expense of purchasing– and complexity of integrating– yet another system. Outdated technology that doesn't scale for large volumes of users is a performance risk, and restrictive licensing models mean widespread use is costly. A single deployment model– only on-site or only hosted– may no longer align to the organization's IT strategy or expense preferences, yet without a way to migrate from one model to another, organizations are either "locked in," or left to purchase a new system entirely.
We Provide:	**Flexible Deployment**. A modular structure appropriately segments capabilities into distinct functionality for specific areas like business-development, resource management, project management, HR, or finance & accounting. Yet all of the established underlying relationships stay connected, so no unnatural boundaries later emerge to fragment information or disconnect workflow. The system can be deployed on-site, or provided via a hosted software-as-a-service (SaaS) model, and an organization can migrate from one model to another as needs change. Flexible licensing models mean the investment can be capitalized or expensed.
So You Can:	Instead of a massive, potentially disruptive cut-over to entirely new processes, organizations have the option of a more moderate, incremental approach to managing change– more likely to drive the widespread user adoption so crucial for total control. Essential capabilities– such as financials and project-management– can be deployed promptly, delivering a quick return-on-investment (ROI,) while other capabilities can be added in phases or as the business expands. SaaS and on-site deployment options align to IT resources and expertise, and an organization can migrate to/from a hosted environment to/from an on-site deployment whenever needs change. Organizations no longer need to wait behind other priorities in complicated, drawn-out budget cycles, as the ownership expense can be spread over time, and transformed from a capital acquisition to an expense.
Just Think:	A small yet rapidly-growing organization of less than 100 employees has economical access to solve its most critical project-management and financial-accounting needs– without a massive IT investment or burdensome capital acquisition. Yet after 18 months of rapid growth, can naturally connect HR, CRM, and resource-planning capabilities, expand to 2 new international offices, and migrate to an in-house IT department… all on the same system.

What are the C-Level benefits of Total Control?
With Total Control, firms of all kinds gain consistent profits and avoid unnecessary risk.   Total Control **guides decisions** so all levels can appropriately adjust to changes in projects so margin is consistent, and **adapts easily** so the firm can respond to external pressures and internal objectives without risky inefficiency. KSF: Firms **Ensure Profitability**.

How do clients benefit from Deltek Maconomy's Total Control?

Technia	"The profitability of projects has improved, thanks to our ability to go in and renegotiate at an early stage when we detect that the original project assumptions are no longer valid."
Profero	"Maconomy aligns with how we run our organization, from job-bagging, project control and project reporting."
Technia	"We chose Maconomy because they have a clear focus on our industry."

3. Deep Insight
Now you can constantly improve.

Only Deltek Maconomy establishes **deep insight** into all areas of the business.

Instead of **unexplained results** that PS organizations face today, firms with deep insight can *constantly improve*.

What does it mean to have deep insight?
Deep insight is knowledge developed from a complete understanding of the entire operation, which comes when appropriate information users can identify the relevant cause-&-effect relationships between decisions or activities and the results. Adjustments can be made quickly and moderately, and results once again immediately evaluated, for near constant feedback on what to do more of, change, or stop doing. **Unlike** disconnected point solutions that can't transform outdated, inconsistent, and unrelated data into knowledge, Deep Insight in Deltek Maconomy is:

- *Accurate*. Information is consistent so it's trusted, and constantly updated so it's appropriately current for the user's need.

- *On-Demand*. Information is available to users at all levels, when & how they need it.

- *Linked*. The context is completely connected across the entire organization workflow– linking front-office data among clients, resources, & work with back-office financial results– so the information "tells a story" that explains "reasons why" behind results.

- *Infinite*. Users at all levels across the entire organization can appropriately ask– and answer– any question they may have about relevant areas of the business.

How does Deltek Maconomy deliver Deep Insight?

Capabilities like **consolidated information**, **on-demand dashboards**, and **deep analytics** set Deltek Maconomy apart as the most superior approach to developing Deep Insight.

1. Consolidated Information   *Information you can trust.*

Better Than:	Individual stand-alone solutions are disconnected silos of information, and fragmented reports from each have no way of establishing a complete relationship among clients, resources, work, and financial results. Combining data for even a partial perspective of the entire operation means complex, costly, & risky data extraction. Complex databases make this difficult, and data disconnected from its original source is immediately out-of-date. Duplicate data must be reconciled, and it's impossible to know which version to trust.
We Provide:	**Consolidated Information**. Unlike point solutions which are not designed for complex reporting, a single separate reporting environment is designed for performance and efficiency, yet is synchronized with live data. Instantly updated whenever status changes, information is current and consistent through any perspective. Relationships among clients, resources, work, and financial results are constant and unbroken, so data always stays in context. Any view of the information– from simple status to deep analysis– is accurate. More than 100 best-practice report templates span the needs of the entire organization– yet each report is flexible for users to modify by editing queries, or by adjusting layout and design.
So You Can:	Current information, constantly connected and kept in context, means data becomes information. Instead of outdated and unreliable reports, users at all levels across the organization can rely on the information, in any format from dashboards to reports to deep analytical queries. Users can even schedule reports for periodic distribution, such as weekly or monthly, and distribute via e-mail.
Just Think:	An PS organization can inform decision-makers at all levels with reliable and trusted information– without heavy investment in complicated reporting or data-warehousing initiatives.

2. On-Demand Dashboards   *Visible issues & a quick path to solutions.*

Better Than:	Outdated point solutions provide only complex reports in numerical tables that are time-consuming and cumbersome to interpret, because they aren't easily able to highlight information. Absent any meaningful tables, charts, graphs or even colors, reports don't draw attention to problem areas. Worse, reports like these are typically disconnected from the underlying data, so there's no way to link to any related details. Users are stuck without a simple view to focus attention on problem areas, yet can't access more details for a complete picture. Beyond simple "status" at the time they were produced, reports like these provide little value.
We Provide:	**On-Demand Dashboards** deliver visual information across the organization with charts and graphs that make status immediately clear, and– unlike static reports– dashboards stay connected to the data. Relevant information is displayed for each role– like profit & cash flow information for Finance, project or job status for Project Management, or pipeline and revenue for Business Development. As changes occur during the project lifecycle, underlying cause-and-effect relationships among clients, resources, work, & results automatically update Key Performance Indicators (KPIs) in key success areas like Utilization or Profit Margin– comparing projected results to expected performance.
So You Can:	Content to be Added.
Just Think:	<TBA>

3. Deep Analytics   *The "why" behind the "what," & the "what" to do about it.*

Better Than:	Outdated point solutions provide data only in rigid PDF reports. Designed for only typical, highly-repeatable questions, reports can't be easily adapted to answer the user's immediate specific question. Complex queries are too complicated for most users, and jeopardize system performance. IT must extract information, and then prepare the needed reports– which is too time-consuming for urgent issues. Getting answers means trying to interpret multiple reports, or exporting data to Excel so that it can be formatted. Once in Excel, detached data is unreliable because it's out-of-date, and also easily changed. Questions go unanswered, and problems are left unsolved.
We Provide:	**Deep Analytics**. Data is extracted and organized so deep analysis doesn't risk of slow performance, yet is constantly synchronized so it's current. A structured view of accurate, current data guides free exploration of the information. Dimensions like client, business unit, service, project type are used to join information into nearly any context. By maintaining relationships among clients, resources, work, actual and expected results, data is transformed into information that can tell a story of what should have happened, what happened, and why.

So You Can:	Self-service through structured, guided views eliminates the burden that repeated detailed reporting requests place on IT, as appropriate users at levels have infinite ways to explore data for root causes and "real reasons" behind problems. The complete context of the information unites each client interaction into a unified picture of the entire client relationship, spanning past work, work-in-process, and proposed work.
Just Think:	<TBA>

What are the C-Level benefits of Deep Insight?

Deep Insight **explains results** by discovering the reasons behind poor performance. With Deep Insight, firms can identify inefficient and error-prone processes to **improve realization**, can study successful results to i**dentify new-business opportunities**, and will identify the most profitable mix of clients, activities, and resources to **grow predictably**. <u>KSF</u>: Firms with Deep Insight **Win More Business**, **Accelerate Cash Flow**, and **Improve Billability**.

How do clients benefit from Deltek Maconomy's Deep Insight?

Quintiq	"We'll always know what's going on in our subsidiaries around the world. It will be much easier for us to consolidate all business data just seconds after they have been entered into Maconomy somewhere in the world."
Red Brick Road	"We've been able to improve effectiveness and the overall performance of the business."
NTNU	"We can monitor our projects in real-time. We have implemented best practices throughout the organization."
Rambøll	"Maconomy has provided greater transparency in our client relations."

The following chart depicts a "marketecture" diagram of the Deltek Maconomy solution.