

IMPROVE YOUR FIRM'S PERFORMANCE. WITH A THOROUGH OPERATIONAL REVIEW.

CCG EFFECTIVENESS REVIEW

TAKE YOUR ERP SOFTWARE TO THE NEXT LEVEL

Making the decision to move to a new integrated project management platform is a large undertaking for any firm, regardless of size or market. In addition to the considerable financial investment, the change requires a large commitment of resources and often will have far-reaching cultural impacts within your organization. From selecting the best software package to defining the implementation roadmap, embarking on such a change is often a lengthy decision and one full of confusing options and competing interests.

For many firms, the outcome of their implementation — when looking back a year or more later — feels incomplete or did not meet their expectations.

There is a sense that:

- You could be getting more out of your software
- More people in the company should be utilizing Vision
- There are too many redundancies remaining
- You could be more efficient in your business processes
- Users are still relying on separate spreadsheets
- There are still other software systems to be integrated

A CCG Effectiveness Review is a chance to benchmark where you are currently — related to process, culture and technology — and develop a roadmap for taking Vision to the next level within your firm.

Who should be on your Review Team?

The composition of your Review Team will vary depending on the size and complexity of your organization. Most firms include a nucleus group with representatives from Management, Human Resources, Accounting, Business Development/Marketing, Project Management and Administration. Typically, this group is involved for the duration of the review and is in attendance throughout the entire Onsite Analysis Meeting.

In selecting your Review Team, we strongly encourage you to choose a mix of individuals from different divisions and offices. Additionally, including a mix of new and long-term employees will allow us to hear a variety of perspectives and provide the best recommendations for all your stakeholders.



A TRUSTED PARTNER

What is an Effectiveness Review?

A CCG Effectiveness Review is an in-depth, process-based examination of your current software functionality, business processes, and cultural strengths and weaknesses.

The goal of the review is to understand your firm, how it functions on a daily basis, what's working well and where there are opportunities for improvement.

The multi-step process includes a preliminary interview and expectations call, pre-meeting data collection, a Vision database review, an Onsite Analysis Meeting, and, where warranted, additional data collection. (See back for details of each step.)

Six-Step Process to Uncover Your Opportunities

1 Introductory Call

During this brief phone interview, we collect basic information about your firm, review the upcoming steps and answer any questions you may have. This call helps you understand who to select to participate on your Review Team.

2 Preliminary Data Collection

Prior to your Onsite Analysis Meeting, you'll receive forms asking for detailed information about your company, review participants and your current systems. This data will help us plan the agenda for your workshop to best utilize your team's time.

3 Database Review

Our preparation for your Onsite Analysis Meeting also includes reviewing your current Vision database. This configuration analysis provides us with base information about the reach of Vision into your firm, data integrated into the system, the level of automation in place and the quality of the data you use on a daily basis.

4 On-Site Analysis Meeting

This meeting ranges from 1 to 3 days, depending on the size and complexity of your organization. During this meeting, our Strategic Service team uses an automated business process modeling tool to collect detailed information on your current processes, the strengths of those processes, and areas where you're facing challenges or limitations.

5 Report of Findings

At the end of your review, we provide a detailed findings report outlining your current state, including challenges and opportunities.

6 Roadmap

We provide a detailed roadmap for closing gaps and addressing your challenges.

About CCG

From our founding as Deltek's first reseller of Deltek Vision in 2002, CCG has become Deltek's largest and most recognized partner. We serve leading architectural, engineering and professional services firms across North America by implementing and enhancing the value of the core Vision ERP system. Our consultants combine deep technical and accounting knowledge to align Vision with business processes through customizations, workflow automations and data integrations.

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