THE RSM GOVCON WEBINAR SERIES: WEBINAR #1

TOP 3 REASONS TO CHOOSE MICROSOFT WITH RSM GOVCON OVER DELTEK

January 27, 2021

RSM

Future Webinars in the RSM GovCon Webinar Series

- **March 2021** – How to break up with Deltek – Provisional to Final rate calculation with a new system – Microsoft and RSM GovCon
- **May 2021** – How will Microsoft and RSM GovCon help you handle a DCAA audit?
- **July 2021** – Your Project Operations team is limited by Deltek. What can you do about it?
- **September 2021** – Advanced Microsoft Platform Features all Deltek Users are missing
- **November 2021** – You won't find Leads, Opportunities or Proposals in Deltek – How Microsoft and RSMGovCon can take your capture management to the next level

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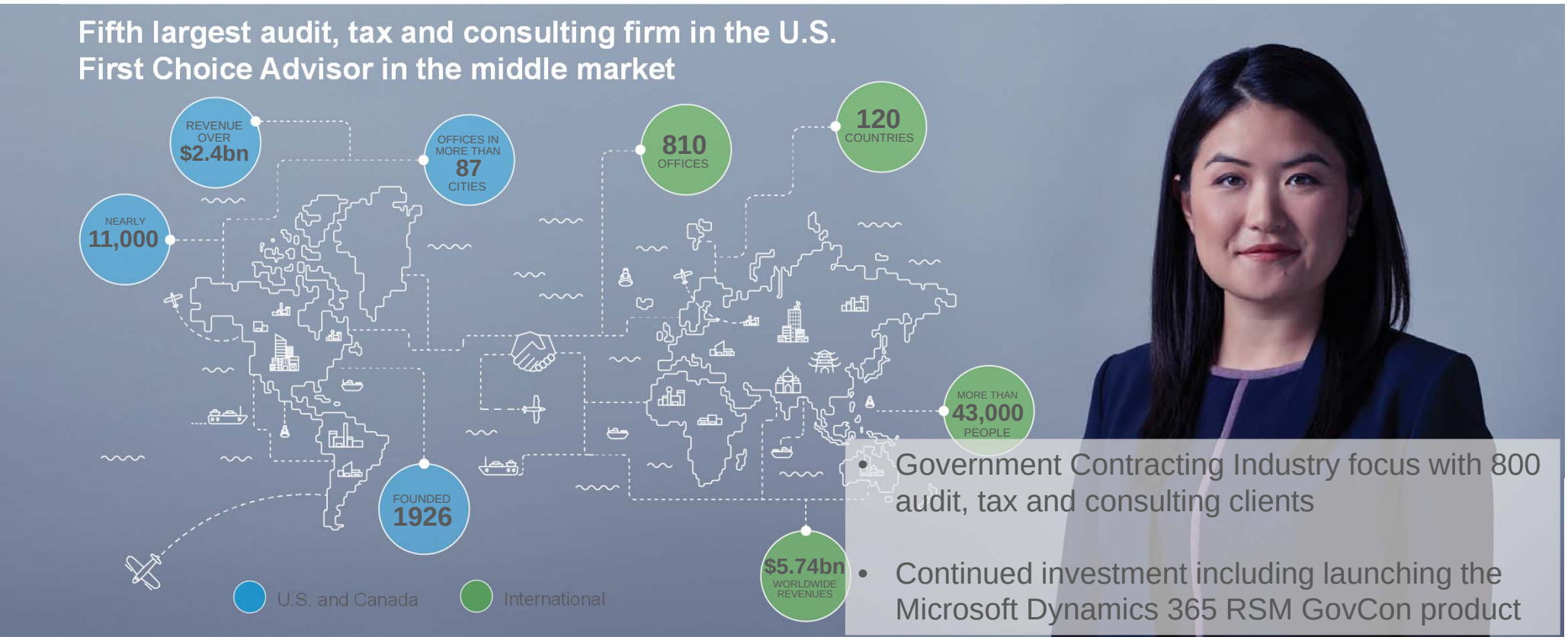
RSM overview



- Government Contracting Industry focus with 800 audit, tax and consulting clients
- Continued investment including launching the Microsoft Dynamics 365 RSM GovCon product

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Presenters

Bryan Koo, CPA

Director

Lead Architect for RSM GovCon, Microsoft Dynamics 365 practice

20+ years of experience with ERP Systems

16 years of Government Contracting Industry Experience

Served as a member of the Microsoft Product Advisory Board

Giacomo Apadula

Principal

RSM Consulting Lead for Government Contracting

Giacomo has over 15 years experience supporting clients on complex government contracting cost accounting and regulatory compliance matters.

Richard Langen

Director

Lead Solution Engineer for RSM GovCon, Microsoft Dynamics 365 practice

25+ years of experience with ERP Systems

15+ years in industry and a former CIO

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Agenda

- What is Microsoft Dynamics 365 and how does RSM GovCon fit in?
- What is the compliance framework that should be considered when implementing a Government Contracting solution?
- Top 3 Reasons to choose Microsoft Dynamics 365 over Deltek

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WHAT IS MICROSOFT DYNAMICS 365 AND HOW DOES RSM GOVCON FIT IN?

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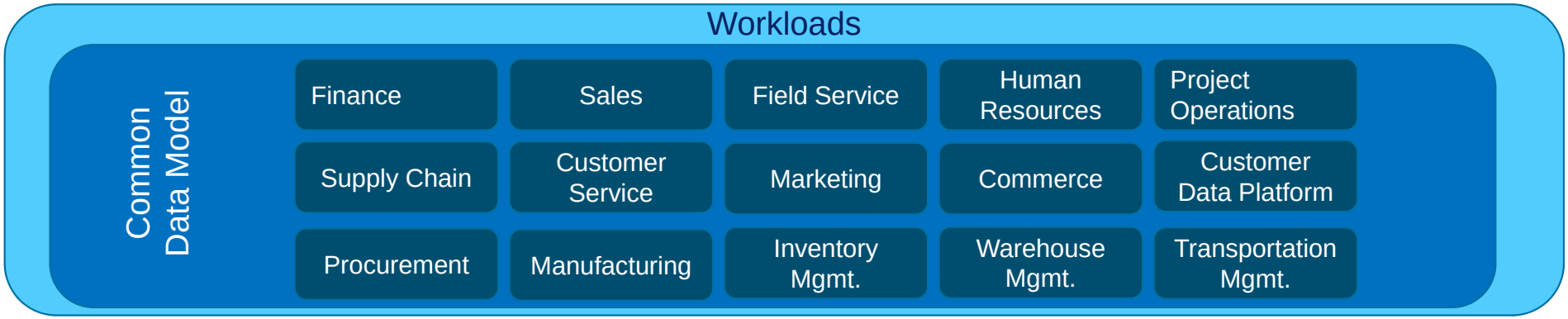
Microsoft Dynamics 365 Platform



https://docs.microsoft.com/en-us/dynamics365

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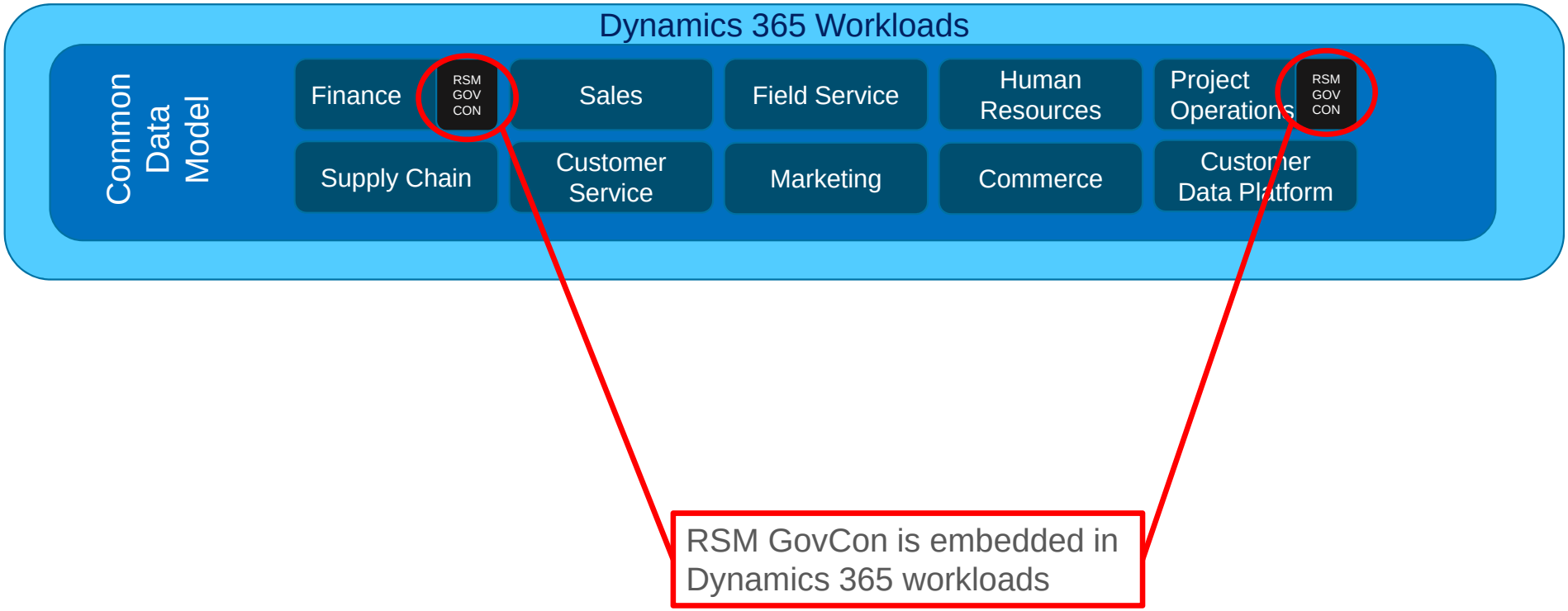
Microsoft Dynamics 365 Platform



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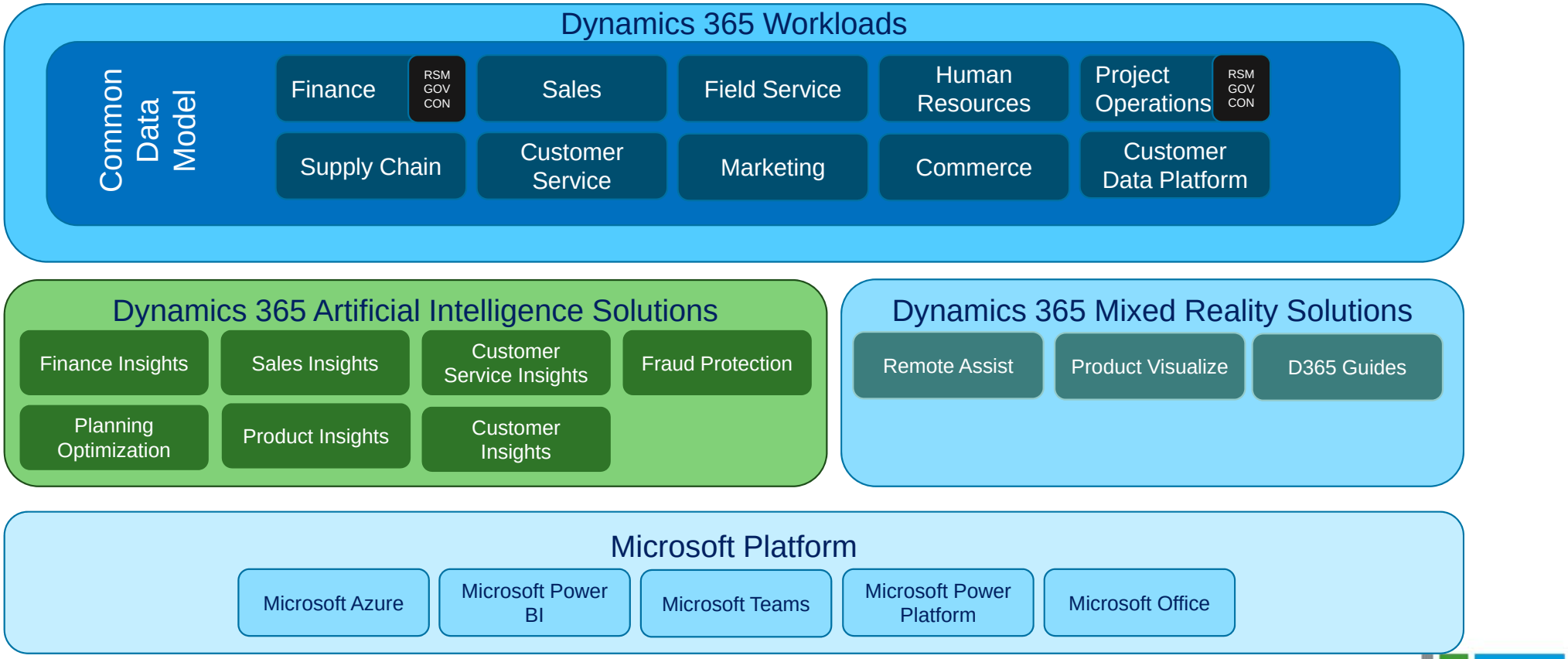
Microsoft Dynamics 365 Platform



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WHAT IS THE COMPLIANCE FRAMEWORK THAT SHOULD BE CONSIDERED WHEN IMPLEMENTING A GOVERNMENT CONTRACTING SOLUTION?

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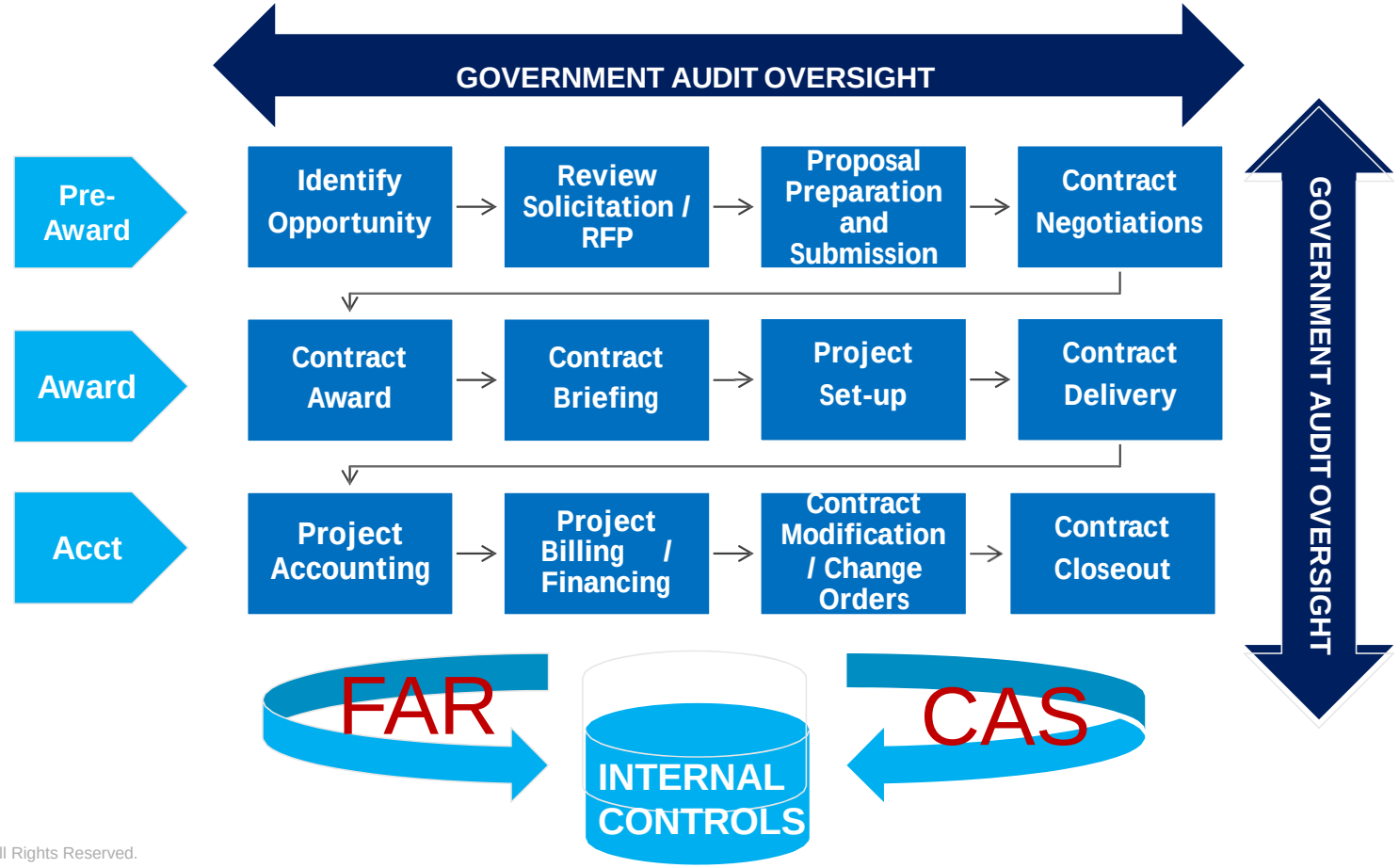
Government Contracting Compliance Framework



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Government Contracting Compliance Framework

Audits can occur within the entire contract lifecycle

- Proposal Audits (Pre and post award)
- Incurred Cost
- Labor Floor checks
- Business Systems
- Forward Pricing Rate
- Disclosure Statement/CAS Compliance
- Defective Pricing (TINA)
- 60+ audit programs in DCAA public directory

Events that can trigger audits

- Inability to provide **document traceability**
- Project Cost ledgers DO NOT **reconcile** to GL
- **Allocations** are not **posted** to Contract or unavailable in standard report
- Inability to clearly demonstrate **labor distributions** based on actual time worked (e.g., total time account)
- Manual workflows or processes which lack adequate internal controls
- Inability to demonstrate identification & segregation of **unallowable costs**
- Billings issues (e.g., don't reconcile to contract costs)
- Lack of internal controls surrounding the firms business systems and/or lack of staff training on GovCon compliance requirements

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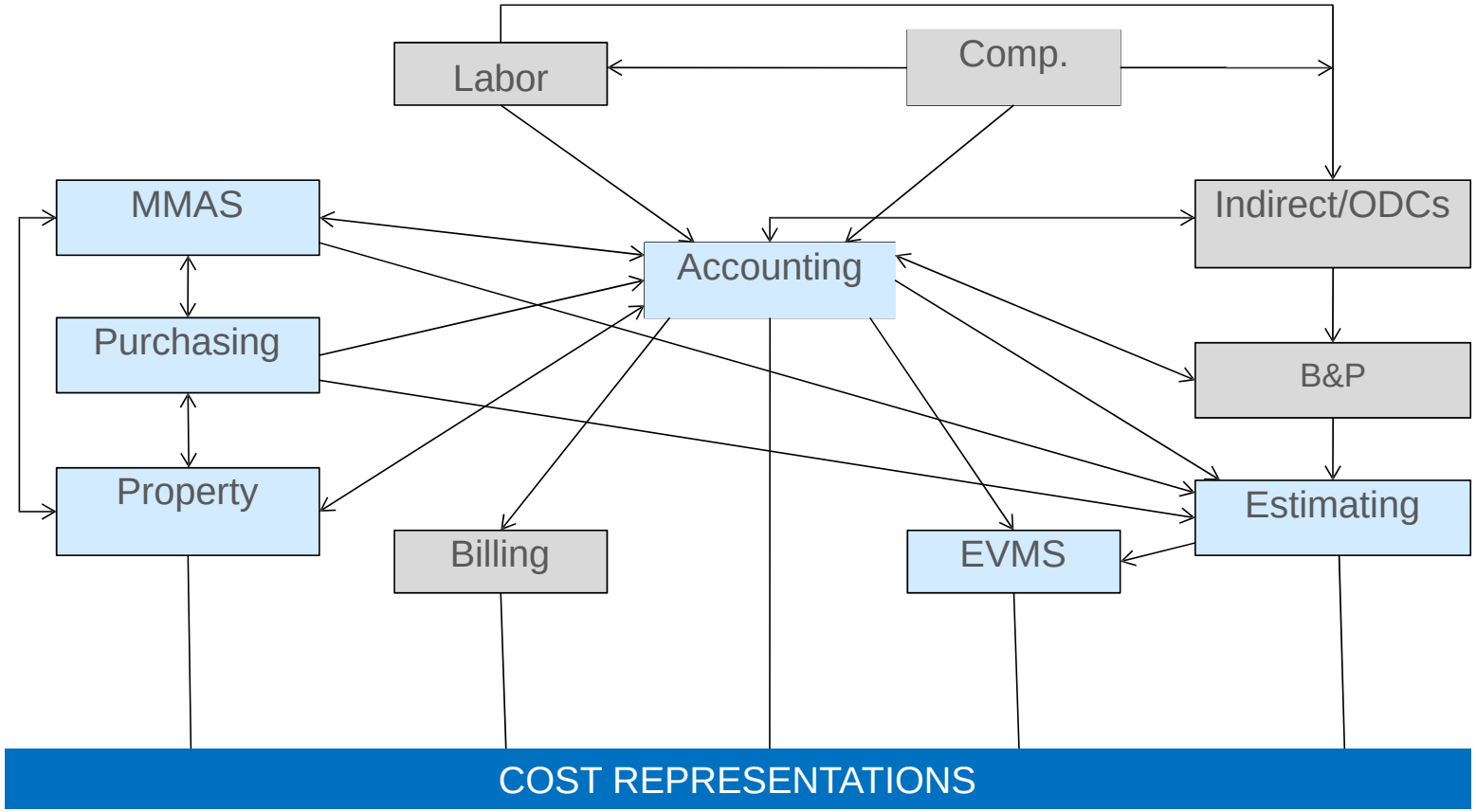
Government Contracting Compliance Framework



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TOP 3 REASONS TO CHOOSE MICROSOFT DYNAMICS 365 OVER DELTEK

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3 Reasons Why Microsoft Dynamics 365 with RSM GovCon

1

Empower organizations to be FAR and CAS compliant

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3 Reasons Why Microsoft Dynamics 365 with RSM GovCon

1. **Empower organizations to be FAR and CAS compliant**
2. ***System flexibility to adapt to organizational needs***

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3 Reasons Why Microsoft Dynamics 365 with RSM GovCon

1. **Empower organizations to be FAR and CAS compliant**
2. ***System flexibility to adapt to organizational needs***
3. **Microsoft technology built into D365**

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REASON #1

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3 Reasons Why Microsoft Dynamics 365 with RSM GovCon

1 **Empower organizations to be FAR and CAS compliant**

- **Proper segregation of direct, indirect and unallowable costs**

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3 Reasons Why Microsoft Dynamics 365 with RSM GovCon

1 **Empower organizations to be FAR and CAS compliant**

- **Proper segregation of direct, indirect and unallowable costs**
  - Ability to design a flexible and best practice account structure
    - 5XXXXX = Direct Expenses
    - 6XXXXX = Fringe Costs
    - 7XXXXX = Overhead Costs
    - 8XXXXX = General and Administrative
    - 9XXXXX = Unallowable
  - Further segregate financial and project activities using flexible dimensions for both reporting and cost pool segregation
    - Example:
      - Your organization maintains 2 Overhead rates
        - Corporate Site
        - Client Site

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3 Reasons Why Microsoft Dynamics 365 with RSM GovCon

1 **Empower organizations to be FAR and CAS compliant**

- Proper segregation of direct, indirect and unallowable costs
- **Manage unlimited cost pools**

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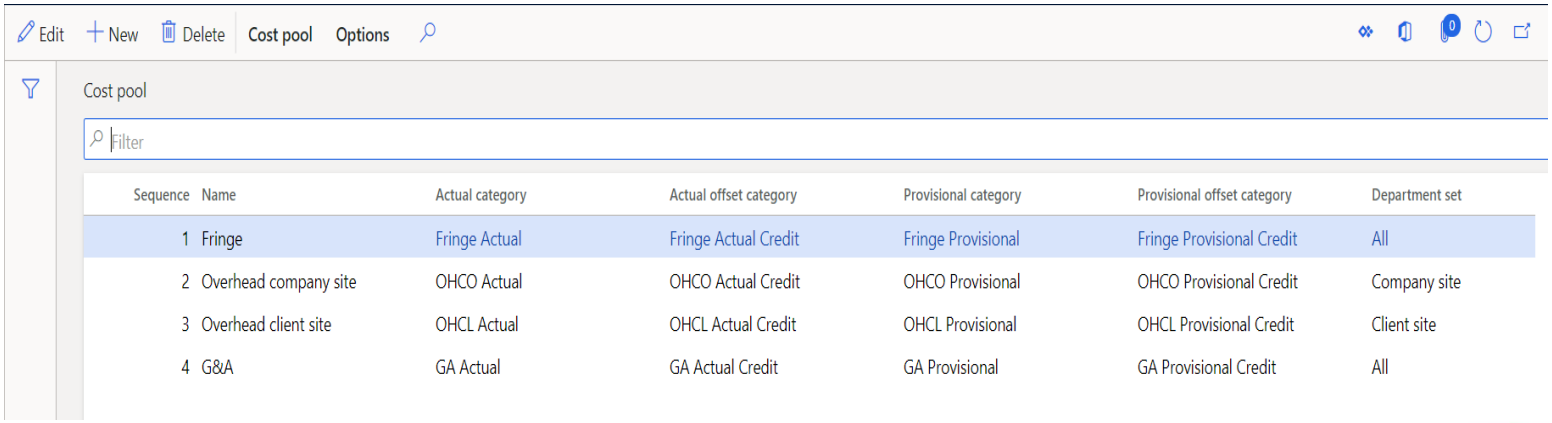
3 Reasons Why Microsoft Dynamics 365 with RSM GovCon

1 **Empower organizations to be FAR and CAS compliant**

- Proper segregation of direct, indirect and unallowable costs
- **Manage unlimited cost pools**
  - Actual
  - Target
  - Provisional



Sequence	Name	Actual category	Actual offset category	Provisional category	Provisional offset category	Department set
1	Fringe	Fringe Actual	Fringe Actual Credit	Fringe Provisional	Fringe Provisional Credit	All
2	Overhead company site	OHCO Actual	OHCO Actual Credit	OHCO Provisional	OHCO Provisional Credit	Company site
3	Overhead client site	OHCL Actual	OHCL Actual Credit	OHCL Provisional	OHCL Provisional Credit	Client site
4	G&A	GA Actual	GA Actual Credit	GA Provisional	GA Provisional Credit	All

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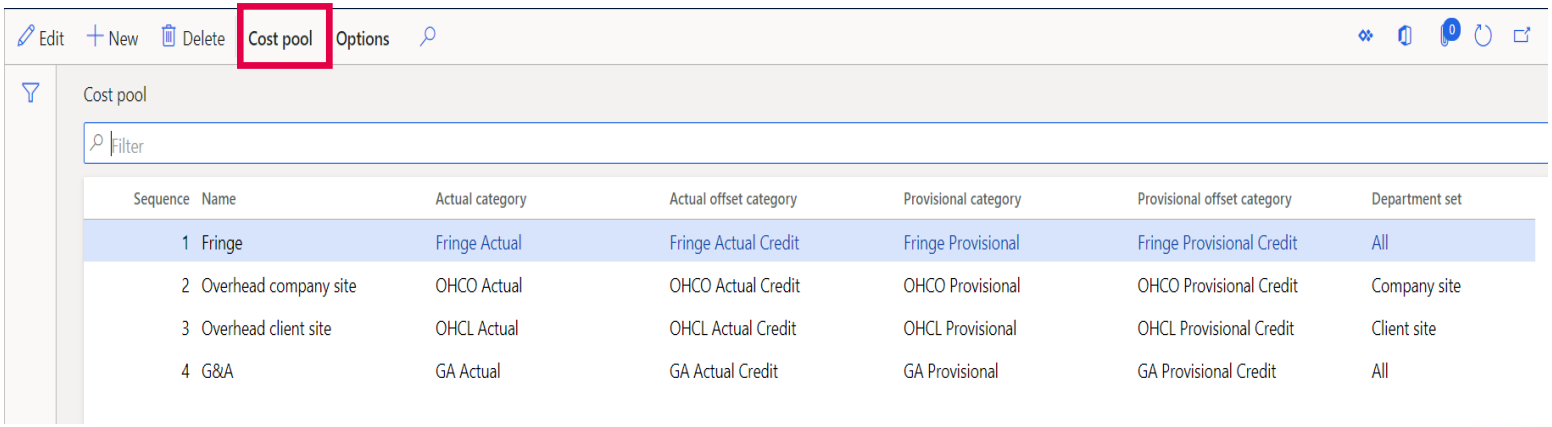

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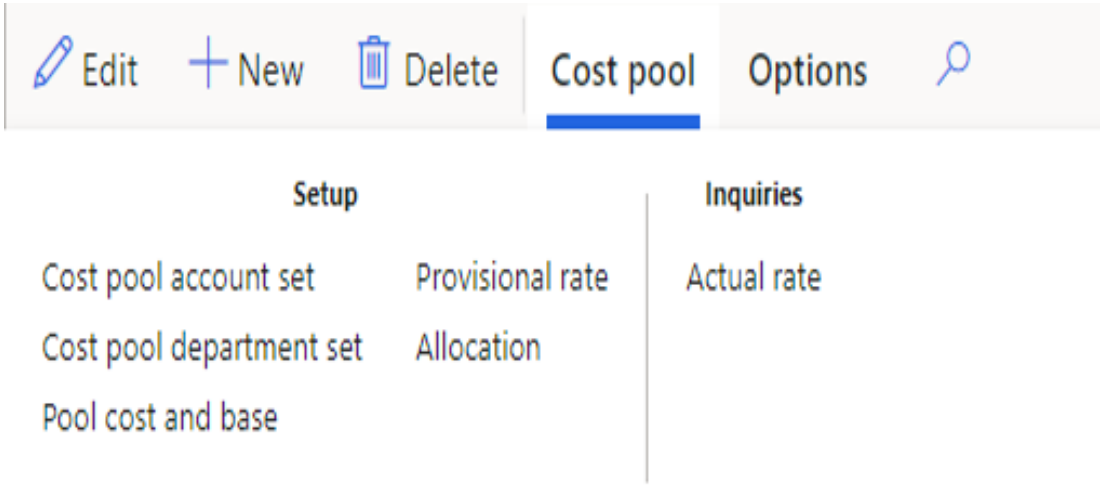

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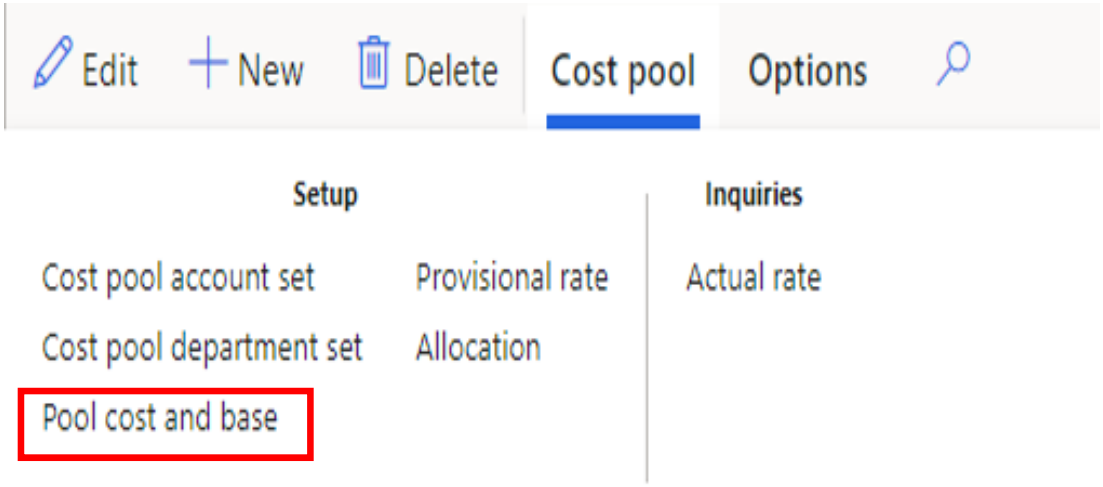

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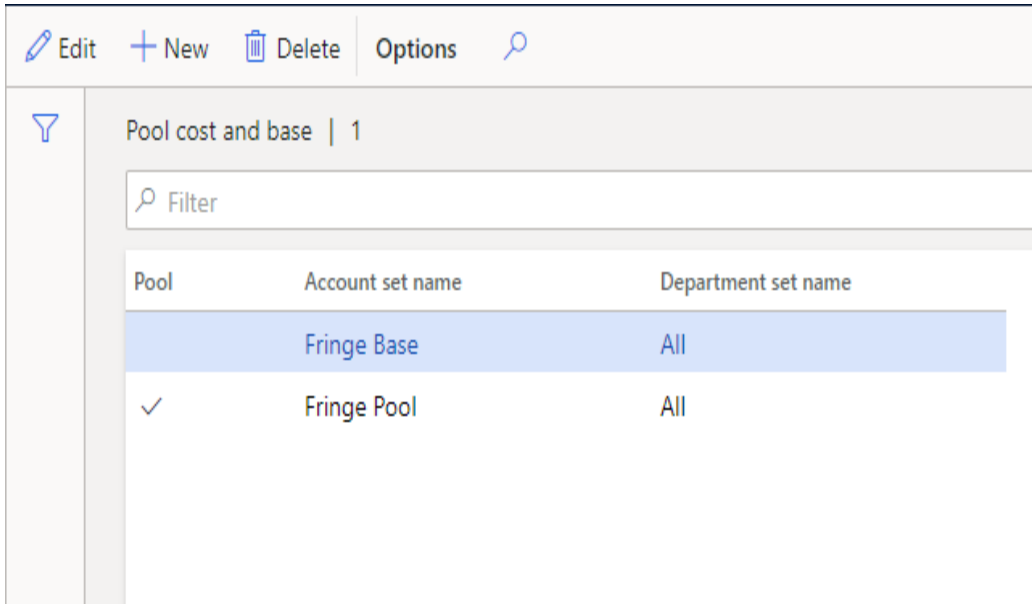

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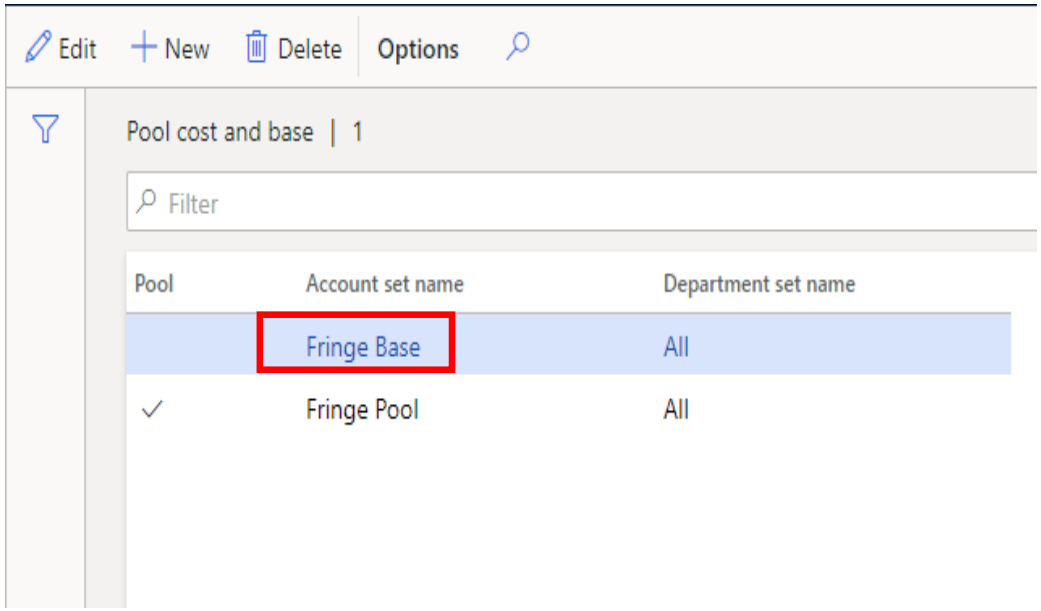

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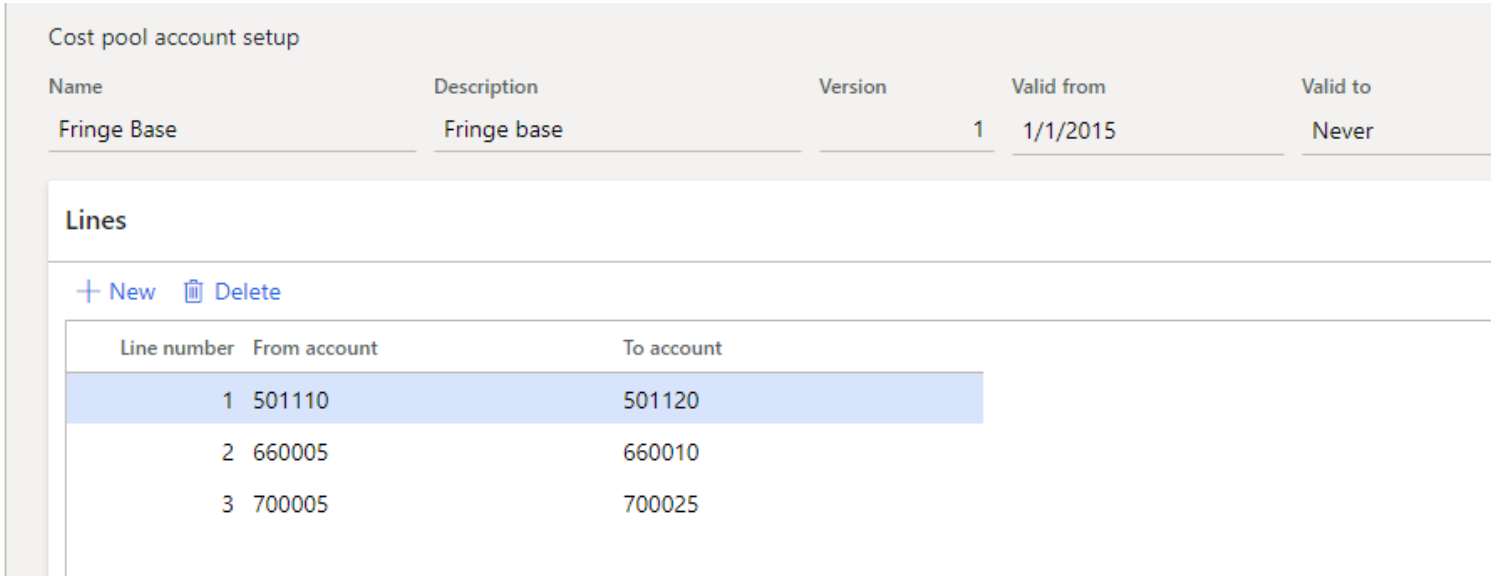

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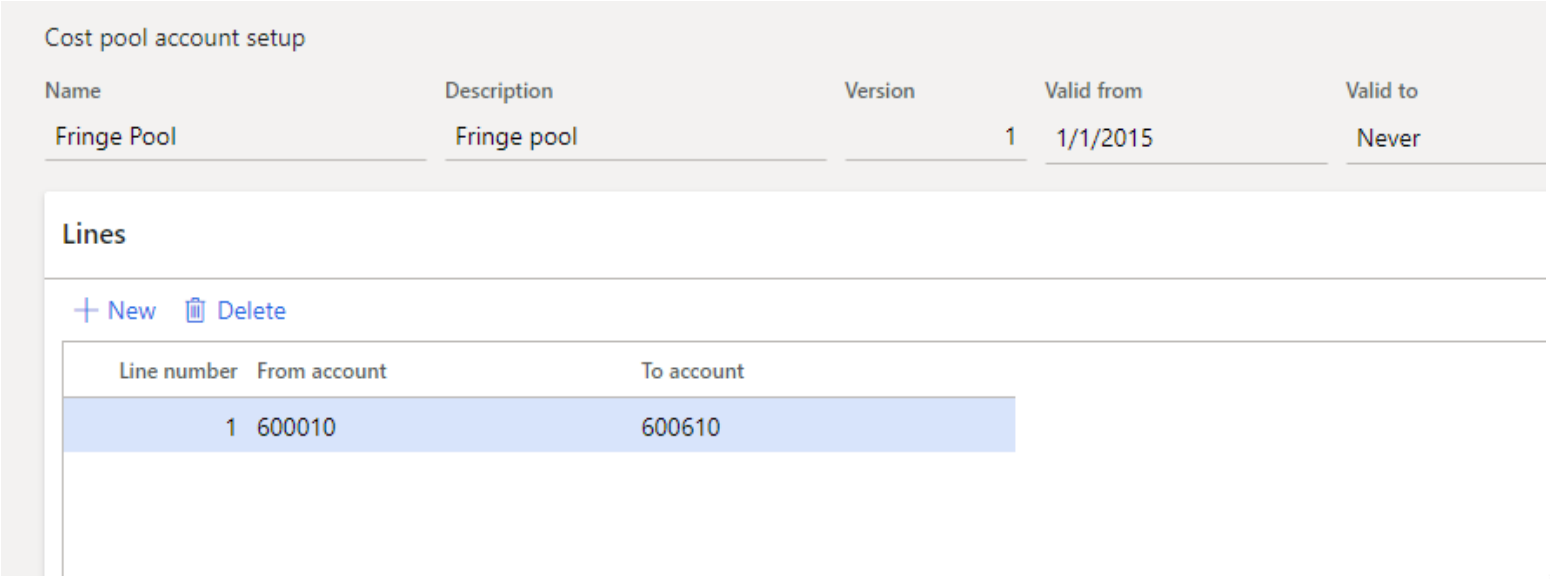

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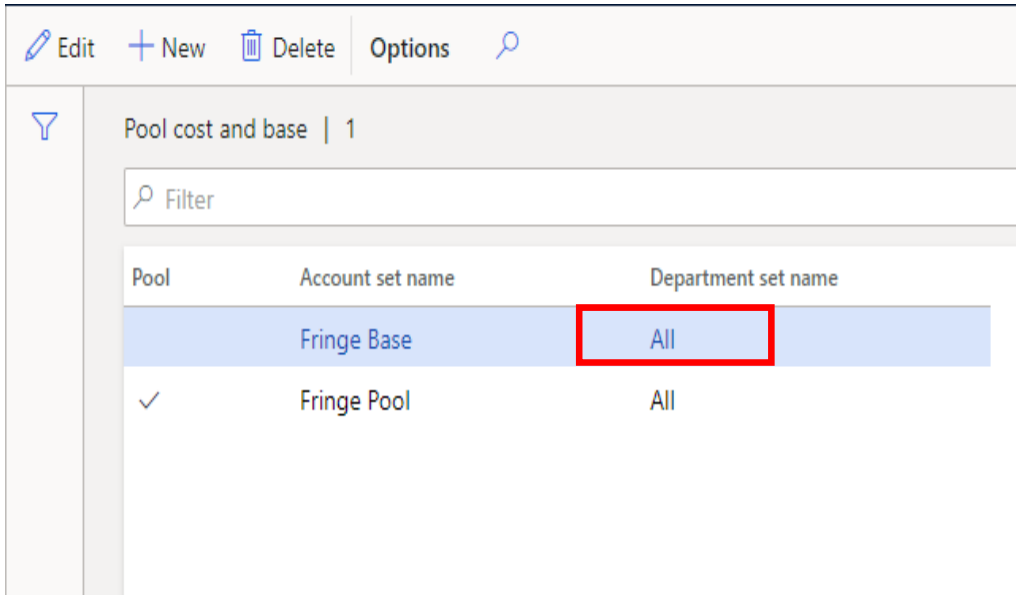

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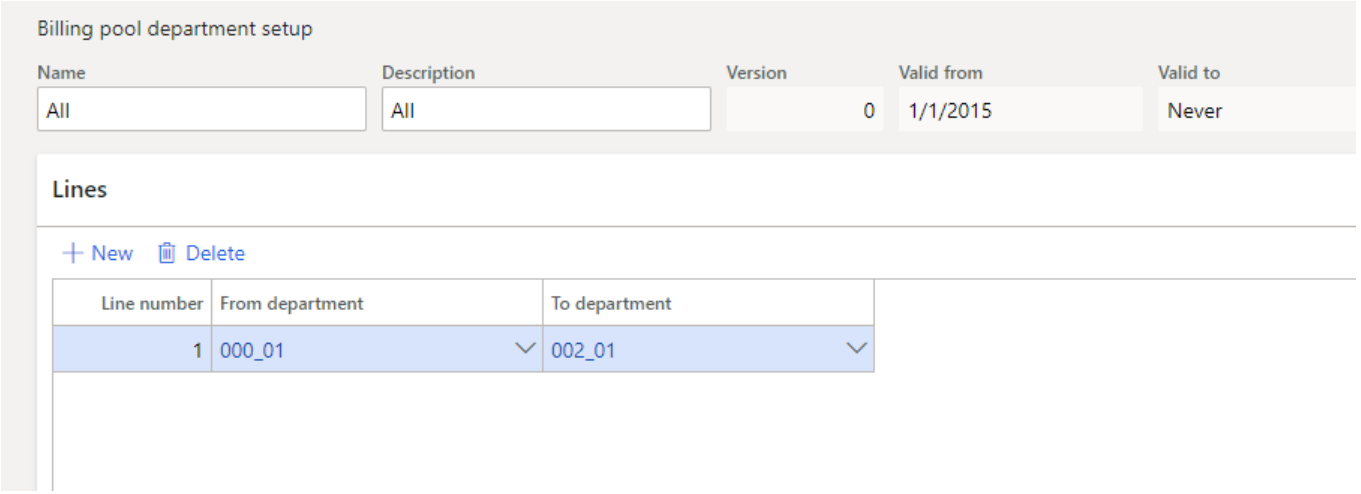

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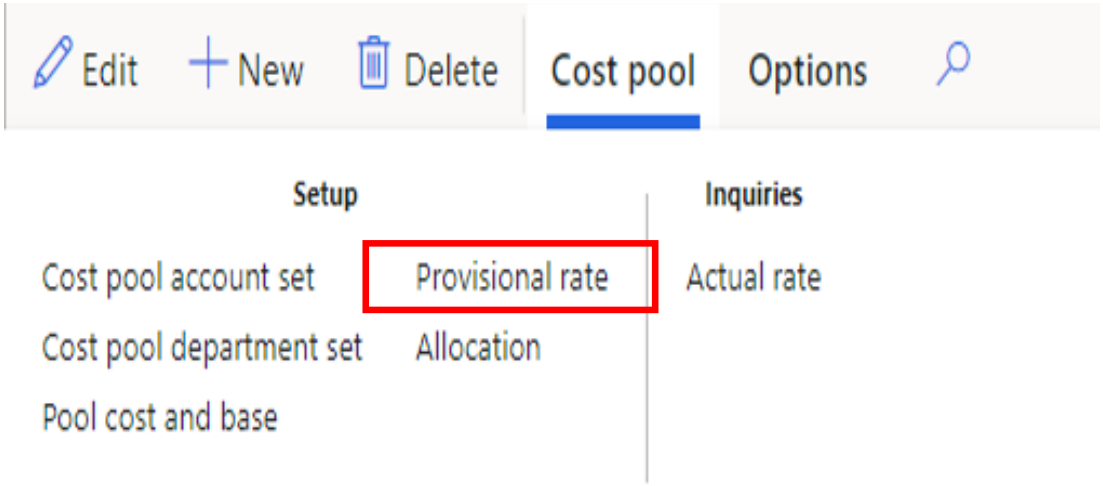

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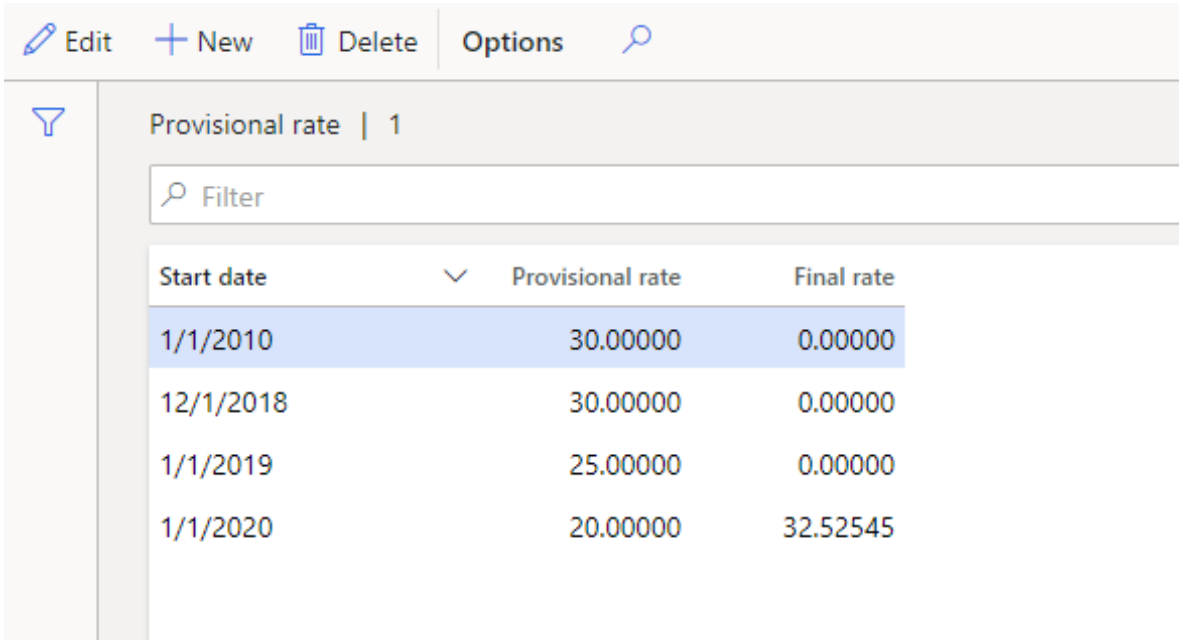

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Client: CUST000007

Contract Number: PCT0000000

Project: PROJ000000228 DOT IT Infrastructure Project

Task:

Period Of Performance: 1/1/2020 ..

Name		Prior Years Actual	Current Period Actual	Current Period Budgeted	Year To Date Actual	Year To Date Budgeted
Revenue.		0.00	126,141.78	250,000.00	126,141.78	250,000.00
Labor						
Labor Hourly		0.00	40,000.00	100,000.00	40,000.00	100,000.00
Labor Salary		0.00	10,000.00	50,000.00	10,000.00	50,000.00
Total Labor		0.00	50,000.00	150,000.00	50,000.00	150,000.00
Expense						
Subcontractors		0.00	12,500.00	50,000.00	12,500.00	50,000.00
Travel - Airfare		0.00	5,000.00	25,000.00	5,000.00	25,000.00
Travel - Lodging		0.00	2,600.00	15,000.00	2,600.00	15,000.00
Travel - Meals and Entertain		0.00	1,200.00	10,000.00	1,200.00	10,000.00
Unallowable ODC		0.00	1,000.00	0.00	1,000.00	0.00
Total Expense		0.00	22,300.00	100,000.00	22,300.00	100,000.00
Burden						
Fringe Provisional	30.00	0.00	15,000.00	0.00	15,000.00	0.00
Overhead Company Site Provisional	40.00	0.00	5,200.00	0.00	5,200.00	0.00
Overhead Client Site Provisional	29.00	0.00	15,080.00	0.00	15,080.00	0.00
GA Provisional	16.00	0.00	17,212.80	0.00	17,212.80	0.00
Total Burden		0.00	52,492.80	0.00	52,492.80	0.00
Total Cost		0.00	124,792.80	250,000.00	124,792.80	250,000.00
Profit		0.00	1,348.98	0.00	1,348.98	0.00

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Total Expense		0.00	22,300.00	100,000.00	22,300.00	100,000.00
Burden						
Fringe actual	17.92	0.00	8,959.90	0.00	8,959.90	0.00
Overhead Company Site Actual	46.81	0.00	5,519.59	0.00	5,519.59	0.00
Overhead Client Site Actual	28.21	0.00	13,306.71	0.00	13,306.71	0.00
GA Actual	14.78	0.00	14,796.83	0.00	14,796.83	0.00
Total Burden		0.00	42,583.03	0.00	42,583.03	0.00
Total Cost		0.00	114,883.03	250,000.00	114,883.03	250,000.00
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- Proper segregation of direct, indirect and unallowable costs
- Manage unlimited cost pools
- **Manage various project types**

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1 **Empower organizations to be FAR and CAS compliant**

- Proper segregation of direct, indirect and unallowable costs
- Manage unlimited cost pools
- **Manage various project types**
  - Time and Materials (flexible bill rates based on labor categories)
  - Various Cost Plus type contracts
  - Firm Fixed Priced
  - Hybrid projects

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3 Reasons Why Microsoft Dynamics 365 with RSM GovCon

1 **Empower organizations to be FAR and CAS compliant**

- Proper segregation of direct, indirect and unallowable costs
- Manage unlimited cost pools
- **Manage various project types**
  - Enforce billings ceilings at the project, task, account, resource levels
  - Set resource labor cost maximums

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REASON #2

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3 Reasons Why Microsoft Dynamics 365 with RSM GovCon

1. **Empower organizations to be FAR and CAS compliant**
2. ***System flexibility to adapt to organizational needs***

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3 Reasons Why Microsoft Dynamics 365 with RSM GovCon

1 **Empower organizations to be FAR and CAS compliant**

2 ***System flexibility to adapt to organizational needs***

- **Enhanced system security based on organizational requirements**
  - Security controls can go to the field and data level
    - Deltek provides screen level security only

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3 Reasons Why Microsoft Dynamics 365 with RSM GovCon

1 **Empower organizations to be FAR and CAS compliant**

2 ***System flexibility to adapt to organizational needs***

- Enhanced system security based on organizational requirements
- **Flexible user and role based menus and screens**
  - Tailor menu based on user roles
  - Ability to rename/hide and include various fields
    - Deltek screen modifications limited

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3 Reasons Why Microsoft Dynamics 365 with RSM GovCon

1 **Empower organizations to be FAR and CAS compliant**

2 ***System flexibility to adapt to organizational needs***

- Enhanced system security based on organizational requirements
- Flexible user and role based menus and screens
- **Flexible audit trail capabilities**
  - Store incremental changes made to any data element
    - Before and after
    - Time/date and user stamp

Deltek does not track incremental changes to records

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3 Reasons Why Microsoft Dynamics 365 with RSM GovCon

1 **Empower organizations to be FAR and CAS compliant**

2 ***System flexibility to adapt to organizational needs***

- Enhanced system security based on organizational requirements
- Flexible user and role based menus and screens
- Flexible audit trail capabilities
- **International support**
  - Language
  - Reporting

Deltek does not support multiple languages

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- Enhanced system security based on organizational requirements
- Flexible user and role based menus and screens
- Flexible audit trail capabilities
- International support
- **Flexible user definable billing and revenue methods**

Billing formula

Filter

Billing form...	Description	Labor	Non-labor	Burden on	Fee
CNF	Cost no burden no fee	Cost	Cost	None	None
CPFF	Cost plus fixed fee	Cost	Cost	Both	Both
CPFH	Cost plus fee on hours	Cost	Cost	Both	Amount on hours
FFP	FFP with ODC Pass Thru	None	Cost	None	None
FFP02	FFP no Pass Thru	None	None	None	None
TM	Time and materials	Sales price	Cost	None	None
TM02	Pass Thru	None	Cost	None	None
TMGA	Time and material - GA	Sales price	Cost	Non-labor	None

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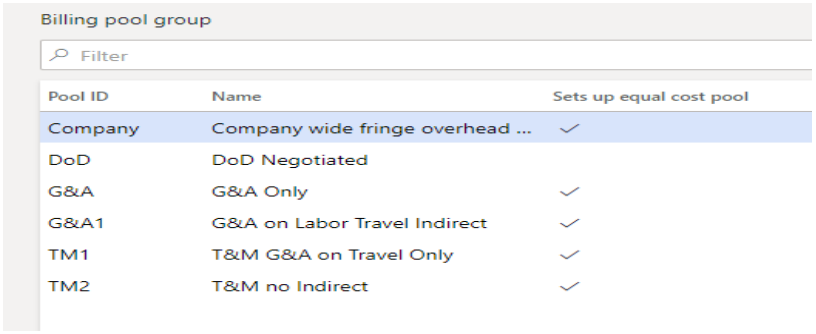

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2 ***System flexibility to adapt to organizational needs***

- Enhanced system security based on organizational requirements
- Flexible user and role based menus and screens
- Flexible audit trail capabilities
- International support
- **Flexible user definable billing and revenue methods**
  - Deltek has pre-defined revenue rules – revenue methods not pre-loaded must be customized and developed by Deltek

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RSM

REASON #3

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3 Reasons Why Microsoft Dynamics 365 with RSM GovCon

1. **Empower organizations to be FAR and CAS compliant**
2. ***System flexibility to adapt to organizational needs***
3. **Microsoft technology built into D365**

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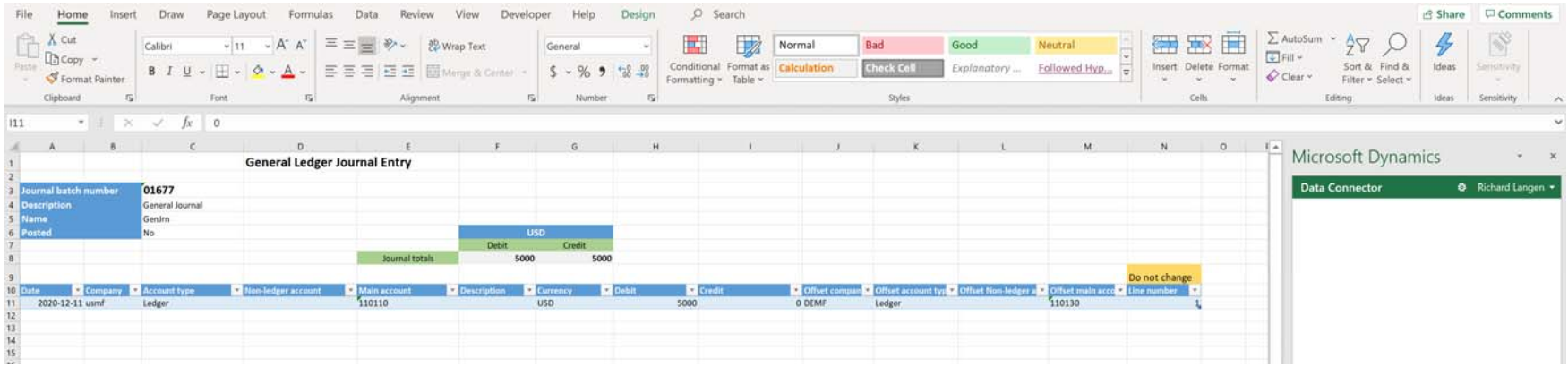
3 Reasons Why Microsoft Dynamics 365 with RSM GovCon

3

Microsoft technology built into D365

- Tight integration with Microsoft Office tools



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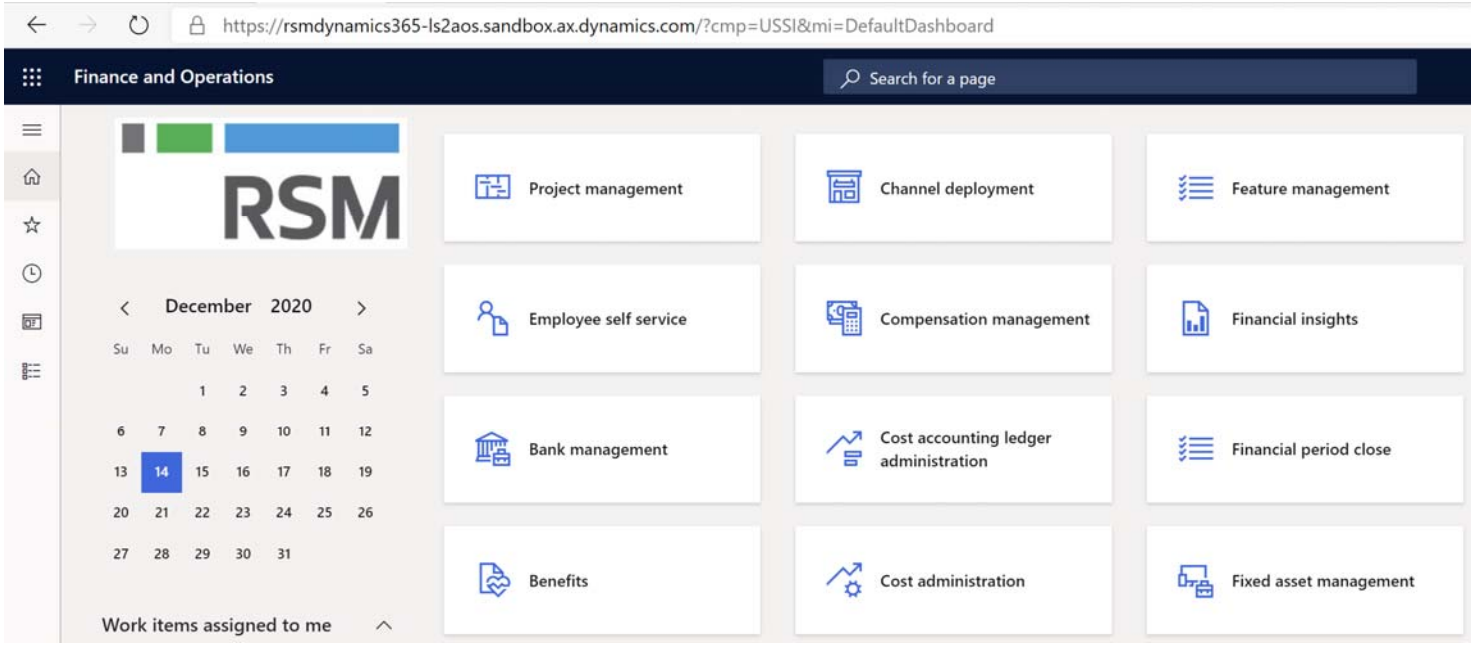
3 Reasons Why Microsoft Dynamics 365 with RSM GovCon

3

Microsoft technology built into D365

- Tight integration with Microsoft Office tools
- Full web-based interface for ease of access



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3 Reasons Why Microsoft Dynamics 365 with RSM GovCon

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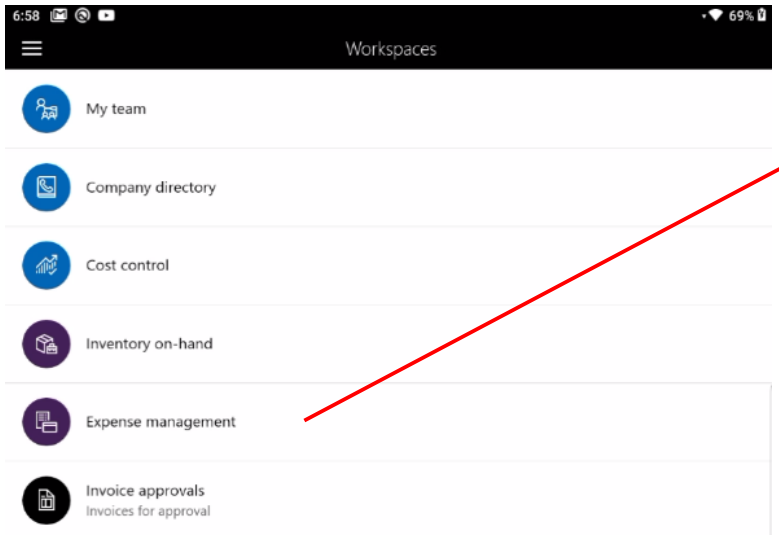

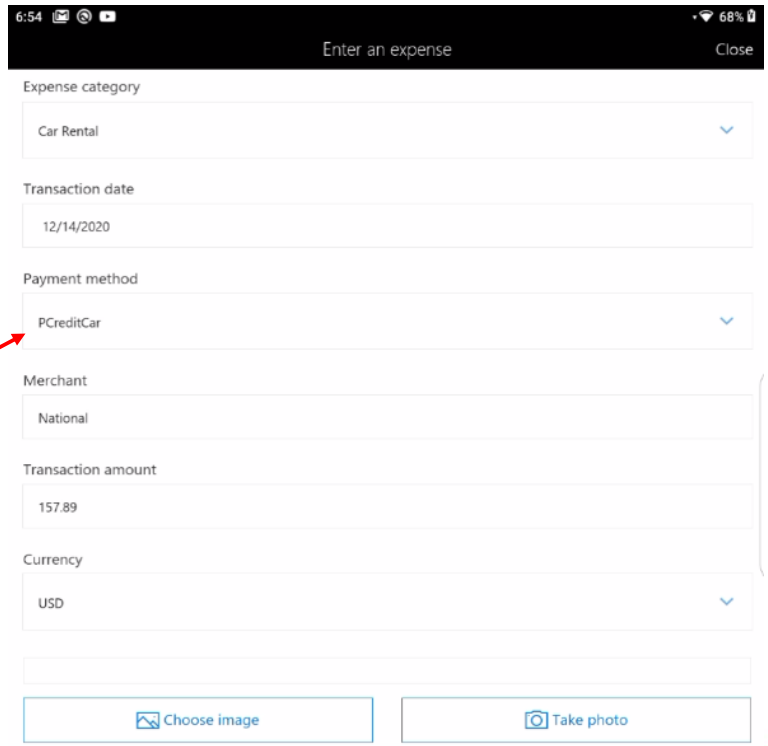

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3 Reasons Why Microsoft Dynamics 365 with RSM GovCon

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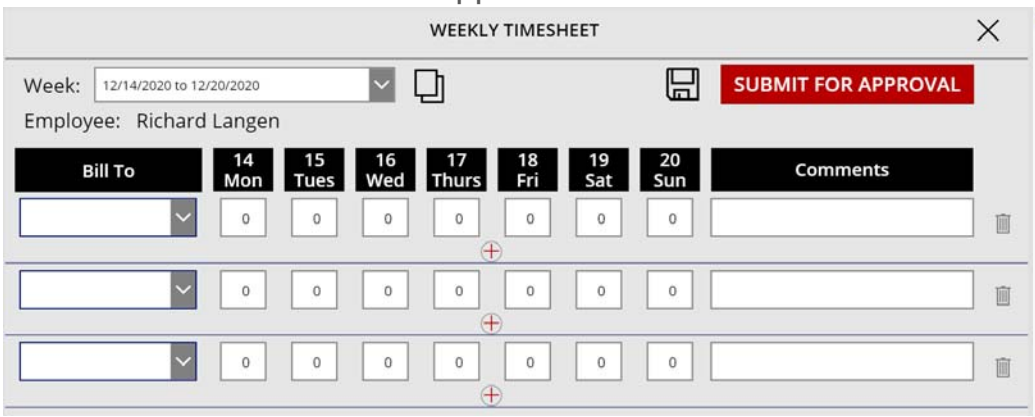

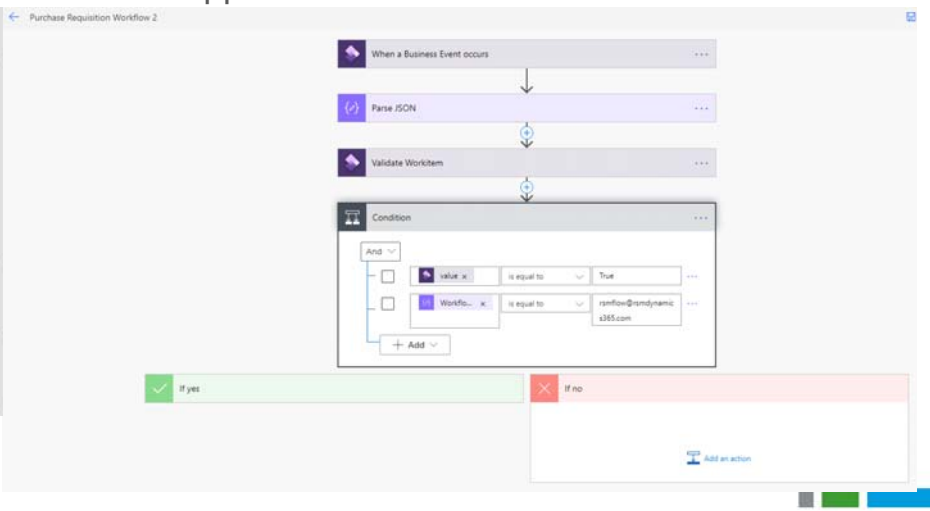

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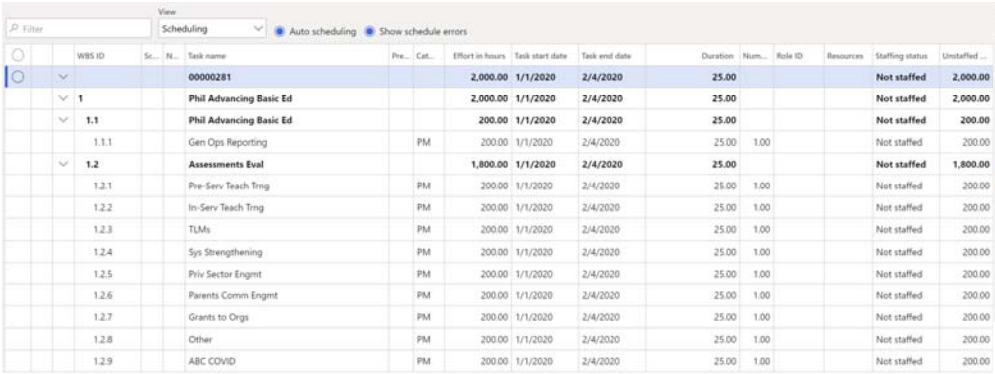

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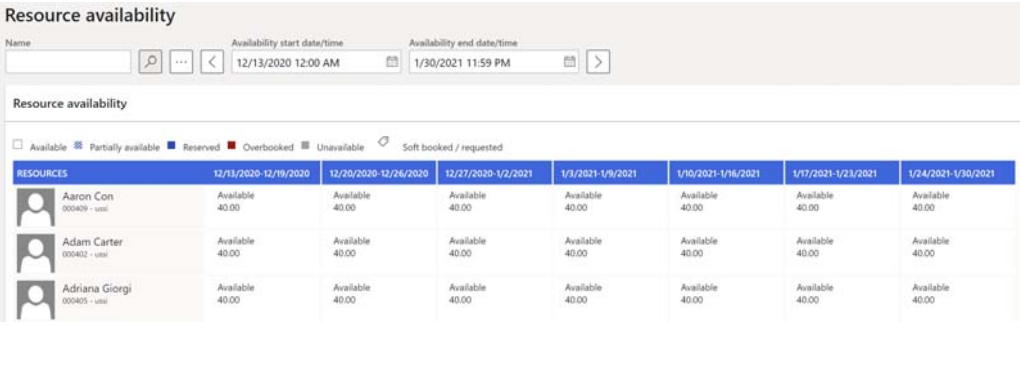
1	Phil Advancing Basic Ed	2,000.00	1/1/2020	2/4/2020	25.00	Not staffed	2,000.00
1.1	Phil Advancing Basic Ed	200.00	1/1/2020	2/4/2020	25.00	Not staffed	200.00
1.1.1	Gen Ops Reporting	200.00	1/1/2020	2/4/2020	25.00	Not staffed	200.00
1.2	Assessments Eval	1,800.00	1/1/2020	2/4/2020	25.00	Not staffed	1,800.00
1.2.1	Pre-Serv Teach Trng	200.00	1/1/2020	2/4/2020	25.00	Not staffed	200.00
1.2.2	In-Serv Teach Trng	200.00	1/1/2020	2/4/2020	25.00	Not staffed	200.00
1.2.3	TLMs	200.00	1/1/2020	2/4/2020	25.00	Not staffed	200.00
1.2.4	Sys Strengthening	200.00	1/1/2020	2/4/2020	25.00	Not staffed	200.00
1.2.5	Priv Sector Engmt	200.00	1/1/2020	2/4/2020	25.00	Not staffed	200.00
1.2.6	Parents Comm Engmt	200.00	1/1/2020	2/4/2020	25.00	Not staffed	200.00
1.2.7	Grants to Orgs	200.00	1/1/2020	2/4/2020	25.00	Not staffed	200.00
1.2.8	Other	200.00	1/1/2020	2/4/2020	25.00	Not staffed	200.00
1.2.9	ABC COVID	200.00	1/1/2020	2/4/2020	25.00	Not staffed	200.00



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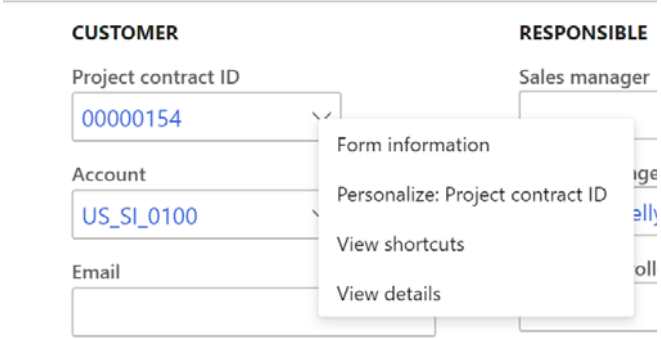
- Project Management including Work Break Down Structures and Resource Management
- Transaction Drill Down (Around) to details



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THE POWER OF THE MICROSOFT DYNAMICS 365 PLATFORM

Product Demonstration

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QUESTIONS FROM ATTENDEES?

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Future Webinars in the RSM GovCon Webinar Series

- **March 2021** – How to break up with Deltek – Provisional to Final rate calculation with a new system – Microsoft and RSM GovCon
- **May 2021** – How will Microsoft and RSM GovCon help you handle a DCAA audit?
- **July 2021** – Your Project Operations team is limited by Deltek. What can you do about it?
- **September 2021** – Advanced Microsoft Platform Features all Deltek Users are missing
- **November 2021** – You won't find Leads, Opportunities or Proposals in Deltek – How Microsoft and RSMGovCon can take your capture management to the next level

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