

Deals Pipeline Stages Update

Quick User Guide

Pipeline Stages: Overview

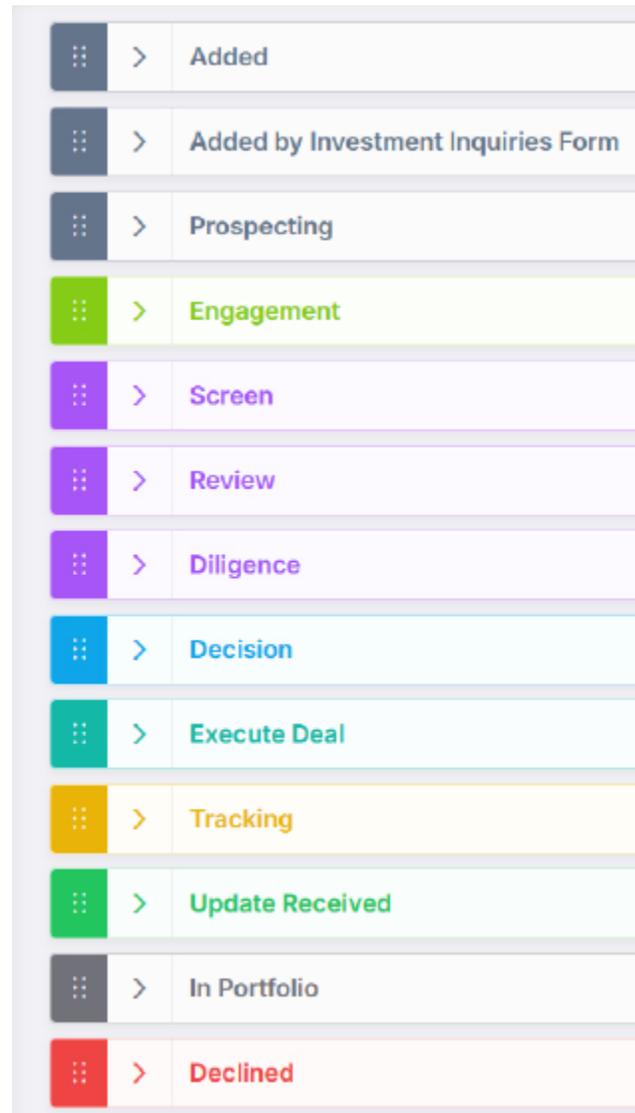
The new Pipeline Stages in Decile Hub reduce stages from 33 to 12.

This new format is designed to simplify the dealflow process.

Email templates associated with the new pipeline are much improved too.



A screenshot of the old pipeline interface showing 33 stages. Each stage is represented by a small icon, a chevron, and a text label. The stages are: Added, Added by Investment Inquiries Form, Reach Out to Cold Lead, Reach Out to Inbound Lead, Reach Out from an Introduction, Company Review [Hold], Set Up Call, Call Scheduled [Hold], Collect Materials, Materials Collected [Hold], Set Up Meeting, Meeting Scheduled [Hold], Review Opportunity [Hold], Indicate Interest in Investing, Develop Deal Memo [Hold], Start Due Diligence, Due Diligence Collected [Hold], Set Up Negotiation Call, Negotiation Call Scheduled [Hold], Approve Investment, Investment Review [Hold], Sign Investment Documents, Investment Documents Signed [Hold], Send Wire, Investment Closed [Hold], Request Update, Update Received [Hold], No Response, Unresponsive, Failed Review, Failed Due Diligence, Declined by GP, and Declined by Company.



A screenshot of the new pipeline interface showing 12 stages. Each stage is represented by a larger icon, a chevron, and a text label. The stages are: Added, Added by Investment Inquiries Form, Prospecting, Engagement, Screen, Review, Diligence, Decision, Execute Deal, Tracking, Update Received, In Portfolio, and Declined.

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Why update your dealflow pipeline?

The new 12-stage pipeline has been designed to be as simple and clear as possible, while also allowing you the flexibility to add other stages as needed.

Updating your dealflow pipeline should significantly improve the process of managing your dealflow with Decile Hub.

How the update works / what to expect

First: opt in. Let us know you'd like the update.

We'll handle the upgrade for you and let you know when it's completed.

You'll get a new **Deals** pipeline with the updated stages - this will be empty.

New deals will now populate your new Deals pipeline.

Your current **Deals** pipeline will be renamed **Deals Archive** – all of your deals will be right where you remember them.

To move current deals to the new pipeline, select the checkbox in the stage group (this will select all deals in that stage), hit  in the top green bar, then select Deals pipeline and the new stage you want for these deals.

Let us know when you have completed migration and we can delete the previous pipeline.

Check out a demo.

We've put together a video on what to expect with this pipeline migration and how to move your deals into your newly upgraded pipeline.

[Check out a quick demo here.](#)