COMMERCIAL FINANCE LAUNCH PROGRAMME · CHOOSE A CRM AND CASE-MANAGEMENT SYSTEM

Deal pipeline template

A ready-made stage map with the fields and reminders a commercial case needs.

01 Your pipeline stages

Map every open deal to a stage so nothing stalls unseen.

List your stages from enquiry to paid, and what moves a deal from one to the next.

Which stage is each of your current live deals in?

02 Case fields

The details a commercial case needs on record from day one.

Client, lender(s) approached, product line, amount and key dates.

Documents received and documents still outstanding.

03 Reminders

Which lender deadlines and client chases need an automatic reminder?

PREFER THIS DONE FOR YOU?

Want your deal pipeline wired into a website or client portal? We build the custom layer.

It's one of the things we build — hand it over and skip the DIY. · digitalroyalty.co.uk

Talk to us