DEAL FLOW: BUSINESSES MATCHED TO YOU, PITCHES AND REFERRALS

You are an approved funder and want ready deals.

BEFORE YOU START

HAVE THESE READY (ABOUT 10 MINUTES)

- Your approved funder account.

STEP BY STEP

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8 STEPS

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1 Step 1 of 8 **Screen: Businesses for <your institution>**

How to get there: Sign in. You land on your home screen ("Dumela" and your name). Then Deal flow.

What you see: Businesses that match your mandate and agreed to be seen, best first.

Tap: the business

What happens next: Their summary.

If something goes wrong: If it still does not work, tap "Talk to a person" on the Help page and tell us what you see.

2 Step 2 of 8 **Screen: Businesses for <your institution>**

How to get there: The same page.

What you see: Each business with Ready, Almost or Not yet.

Tap: Ask to see the pitch

What happens next: The business is asked. You are told when they accept.

If something goes wrong: If it still does not work, tap "Talk to a person" on the Help page and tell us what you see.

3 Step 3 of 8 **Screen: Notices**

How to get there: The bell.

What you see: "<business> accepted".

Tap: the notice

What happens next: You can view and download the pitch.

If something goes wrong: If it still does not work, tap "Talk to a person" on the Help page and tell us what you see.

4 Step 4 of 8 **Screen: Businesses for <your institution>**

How to get there: The same page.

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What you see: "Ask for a progress report".

Tap: Ask for a progress report

What happens next: The business agrees, and a report with management accounts is sent.

If something goes wrong: If it still does not work, tap "Talk to a person" on the Help page and tell us what you see.

Step 5 of 8 **Screen: Refer a deal**

How to get there: Funders & ESD, then Refer a deal.

What you see: A form about the business you declined.

Tap: Send to RMK

Type: The business's name, the person, their cellphone, how much they asked for, and why you declined.

What happens next: The business is asked to agree. RMK assesses it.

If something goes wrong: If it still does not work, tap "Talk to a person" on the Help page and tell us what you see.

Step 6 of 8 **Screen: Notices**

How to get there: Later.

What you see: "<business> agreed".

Tap: the notice

What happens next: RMK assesses all seven areas.

If something goes wrong: If it still does not work, tap "Talk to a person" on the Help page and tell us what you see.

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7 Step 7 of 8 **Screen: Funders who asked**

How to get there: My home.

What you see: Your pitch and progress requests.

Tap: the request

What happens next: Its state.

If something goes wrong: If it still does not work, tap "Talk to a person" on the Help page and tell us what you see.

8 Step 8 of 8 **Screen: The funders you look after**

How to get there: My home.

What you see: Your products.

Tap: the institution

What happens next: Keep them up to date: see guide F3.

If something goes wrong: If it still does not work, tap "Talk to a person" on the Help page and tell us what you see.

WORDS EXPLAINED

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Pitch

The business's own summary for a funder, shared with its consent.

Ready / Almost / Not yet

How ready you are. "Not started" means you have not answered yet.

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