

Sola Salon Studios - The Nurture Pipeline

Timing is not always right for a stylist. The Nurture Pipeline is here to help. Stay in front of your leads and be there when the time is right for them.

When a deal is moved to Closed/Nurture, you'll be prompted to move the Deal into the Nurture Pipeline. This pipeline will allow you to keep your focus on the Leasing Pipeline and the Deals you can close. It is separate from the Leasing Pipeline so you can have clear line of sight to your active Deals while keeping track of the Deals you don't want to lose sight of.

Once a Deal has been moved into the Nurture Pipeline, let it take care of the rest for you. When you add the appropriate information of why the time wasn't right, the Nurture Pipeline will pick up where you left off through automated win-back campaigns. These are built right into the Nurture Pipeline and will work to re-warm your closed leads so they can engage when the time is right for them.

This guide will walk you through how to move a Deal to Closed/Nurture and how to access the Nurture Pipeline, and how to move a Deal back into the Leasing Pipeline.

36 Steps [View most recent version](#) 

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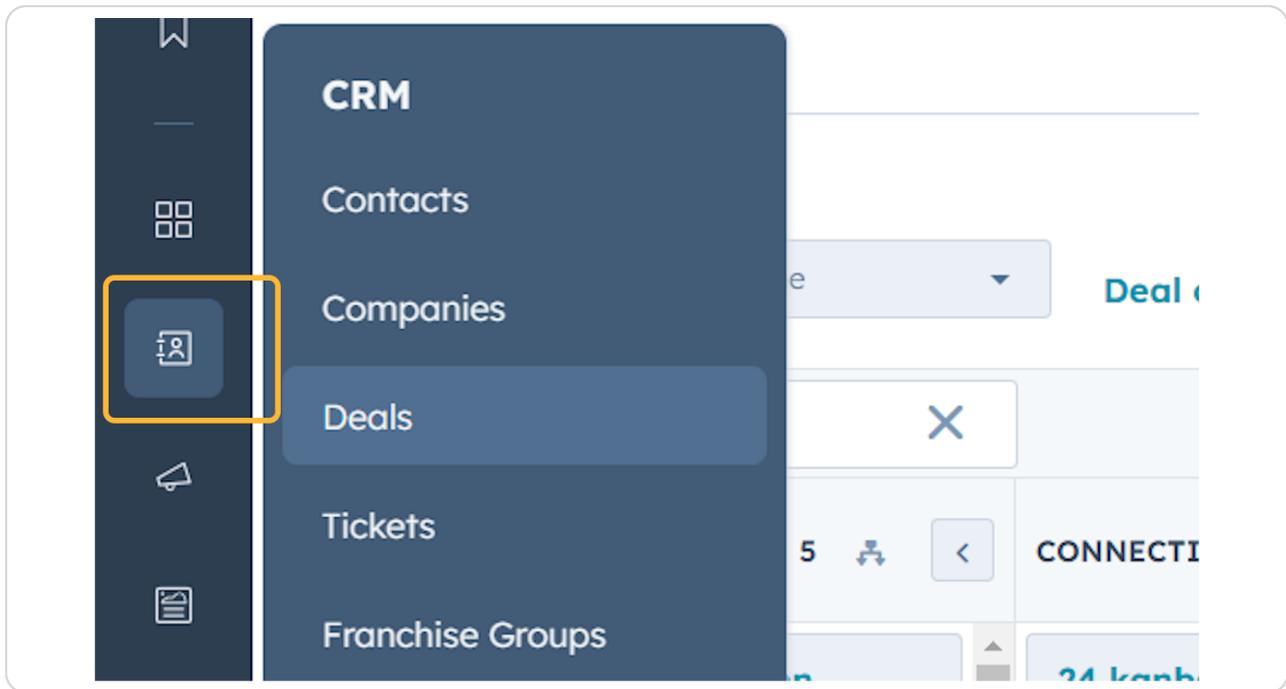
Moving a Deal to Closed/Nurture

23 Steps

The Nurture Pipeline helps you focus on what's most important. Keep your Leasing Pipeline focused on the deals you can close. Let the Nurture Pipeline take care of the rest.

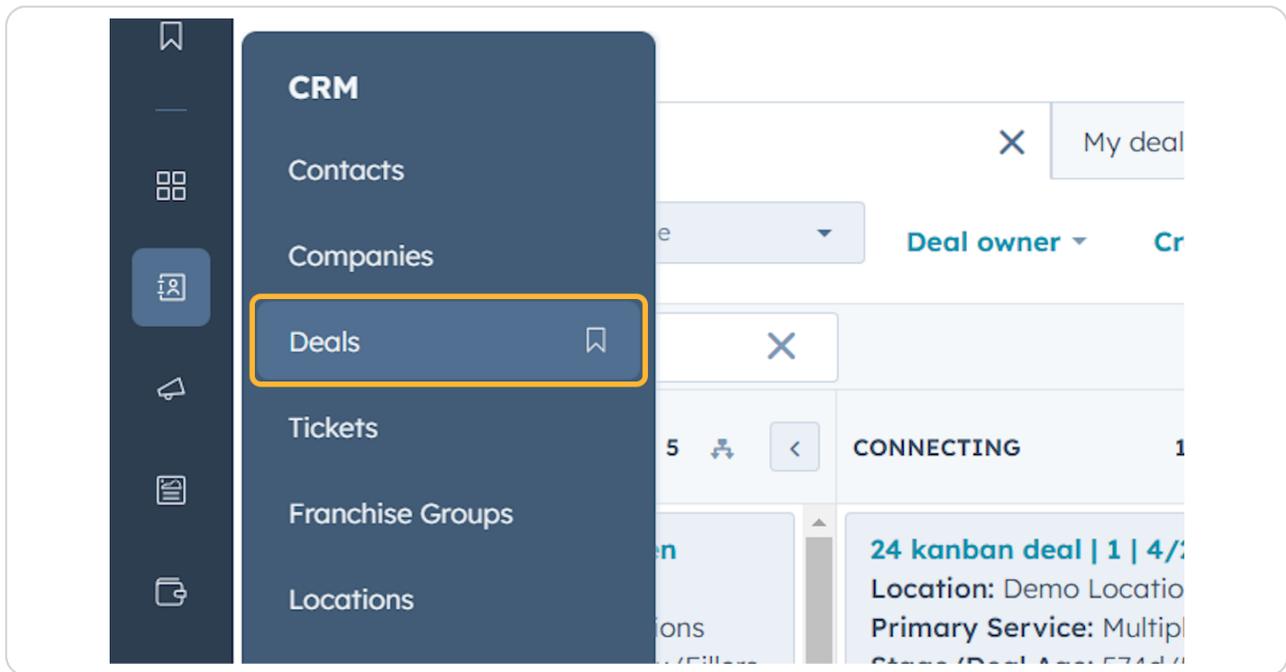
STEP 1

Jump into HubSpot and navigate to the CRM section on the left-hand side



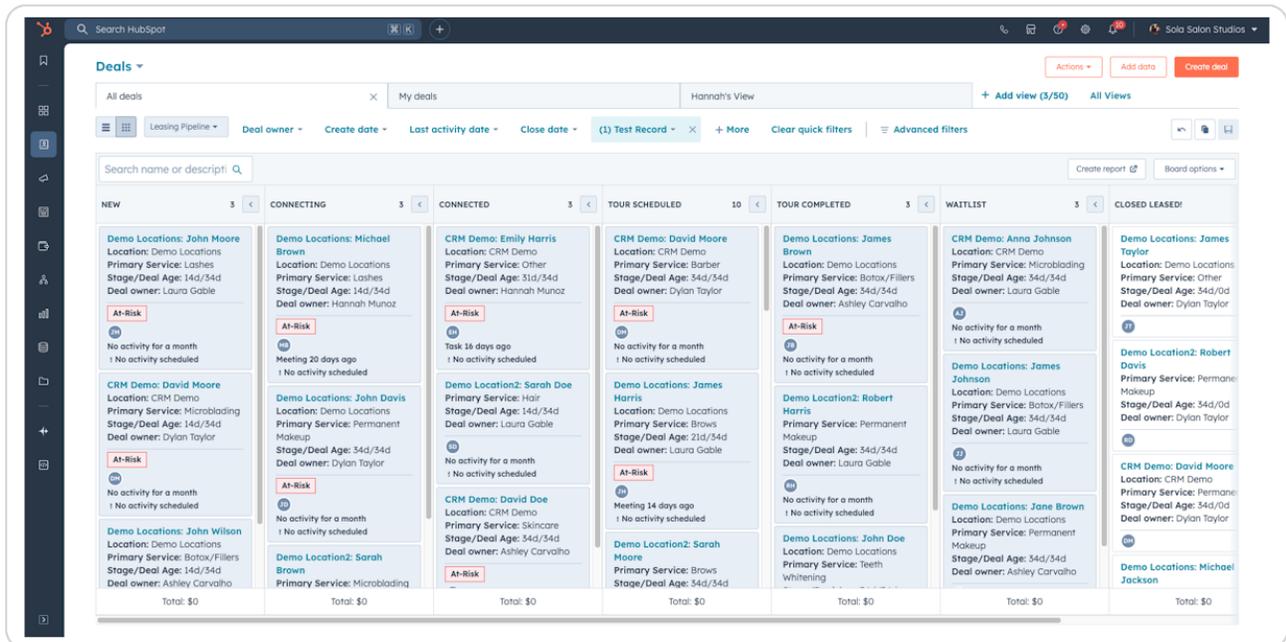
STEP 2

Click on Deals



STEP 3

You'll be taken to the Deal overview



STEP 4

Navigate to the Deal you want to move into the Nurture Pipeline

Note: You can search for Deals to more easily find the Deal you're looking for.



STEP 5

Click on the Deal Card you want to preview and update

1 <	CONNECTED 1 <	TOUR SCHEDULED 1 <	TOUR COMPLETED 0 <	WA
Demo Location2: Sarah Brown Primary Service: Microblading Stage/Deal Age: 34d/34d Deal owner: Laura Gable No activity for a month ! No activity scheduled	Demo Location2: Sarah Doe Primary Service: Hair Stage/Deal Age: 14d/34d Deal owner: Laura Gable SD No activity for a month ! No activity scheduled	Demo Location2: Sarah Moore Primary Service: Brows Stage/Deal Age: 34d/34d Deal owner: Laura Gable SM No activity for a month ! No activity scheduled		

STEP 6

The Deal Card Preview will open up on the right-hand side

The screenshot shows the HubSpot Deals interface. On the left, a table lists deals in various stages: NEW (0), CONNECTING (1), CONNECTED (1), TOUR SCHEDULED (1), and TOUR COMPLETED (0). The 'CONNECTED' deal is 'Demo Location2: Sarah Doe' with Primary Service: Hair, Stage/Deal Age: 14d/34d, and Deal owner: Laura Gable. On the right, the Deal Card Preview is open for this deal. It displays details such as Amount: --, Close Date: MM/DD/YYYY, Stage: Connected, Pipeline: Leasing Pipeline, and Deal Summary. The Deal Summary includes Deal stage: Connected (FOR 15 DAYS), Stage/Deal Age: 14d/34d, Location: + Add Location, Contact: Sarah Doe, Tour Date: Schedule Now, and Deal Owner: Laura Gable. The Deal Card Preview also features a 'Need help? Click here.' link and buttons for Save, Cancel, and View record.

STEP 7

Click on the Stage Dropdown

This screenshot is identical to the previous one, but the 'Stage' dropdown menu in the Deal Card Preview is open, showing the 'Connected' option selected. The Deal Card Preview also displays the Deal Summary, including Deal stage: Connected (FOR 15 DAYS), Stage/Deal Age: 14d/34d, Location: + Add Location, Contact: Sarah Doe, Tour Date: Schedule Now, and Deal Owner: Laura Gable. The Deal Card Preview also features a 'Need help? Click here.' link and buttons for Save, Cancel, and View record.

STEP 8

Click on Closed/Nurture

The screenshot displays the HubSpot CRM interface. At the top, there is a search bar and navigation tabs for 'All deals', 'My deals', and 'Hannah's View'. Below this is a deals pipeline with columns: NEW (0), CONNECTING (1), CONNECTED (1), TOUR SCHEDULED (1), and a fifth column with a red box. A search dropdown menu is open over the fifth column, listing options: Call, Task, Meeting, More, Tour Scheduled, Tour Completed, Waitlist, Closed/Leased, and Closed/Nurture. The 'Closed/Nurture' option is highlighted with an orange box. On the right, a sidebar for 'Demo Location2: Sarah Doe' shows details like Amount, Close Date, Stage (Connected), and a timeline. At the bottom of the sidebar are 'Save', 'Cancel', and 'View record' buttons.

STEP 9

You will be prompted to answer a few questions about the Deal

The main questions you have to answer are:

- Has the lead toured Sola?
- Close Reason
- Add to Nurture Pipeline

These fields are conditional, so depending on your answer, you may be prompted to answer more questions.

Dependent properties ✕

Your organization has chosen to show these properties based on your choice for "Deal Stage". Some properties may be required to continue.

Deal Stage
Closed/Nurture

Has the lead toured Sola? *

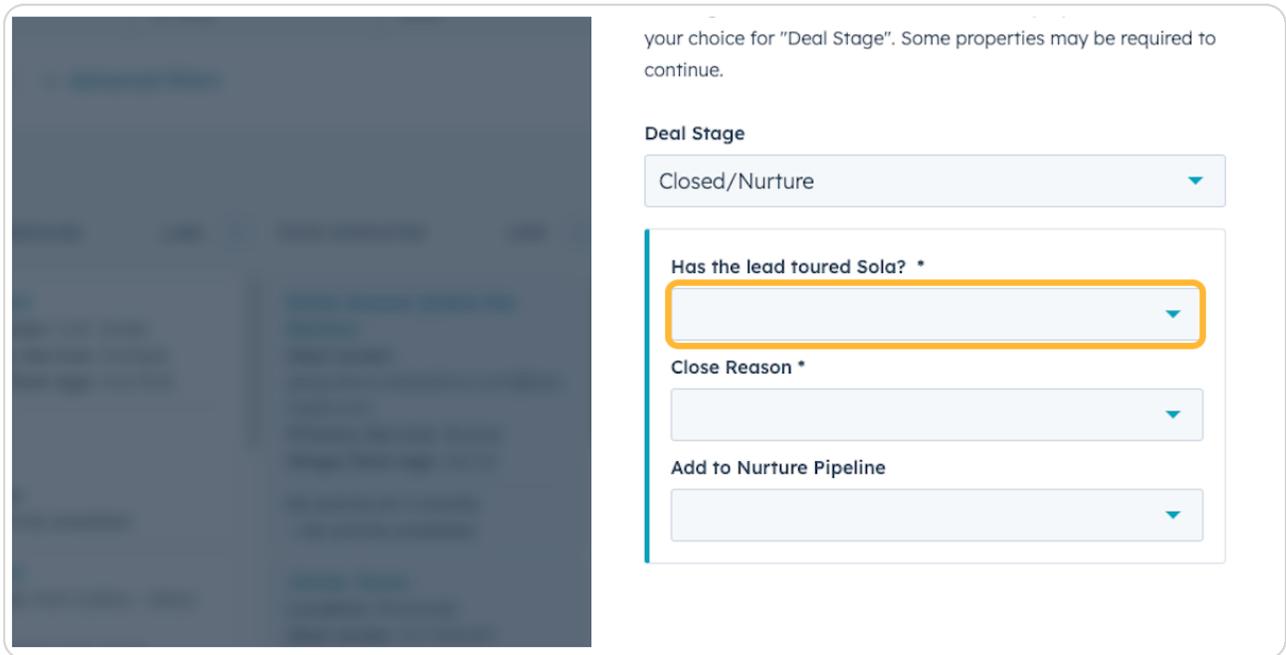
Close Reason *

Add to Nurture Pipeline

Save Cancel

STEP 10

Click on Has the lead toured Sola?



your choice for "Deal Stage". Some properties may be required to continue.

Deal Stage

Closed/Nurture

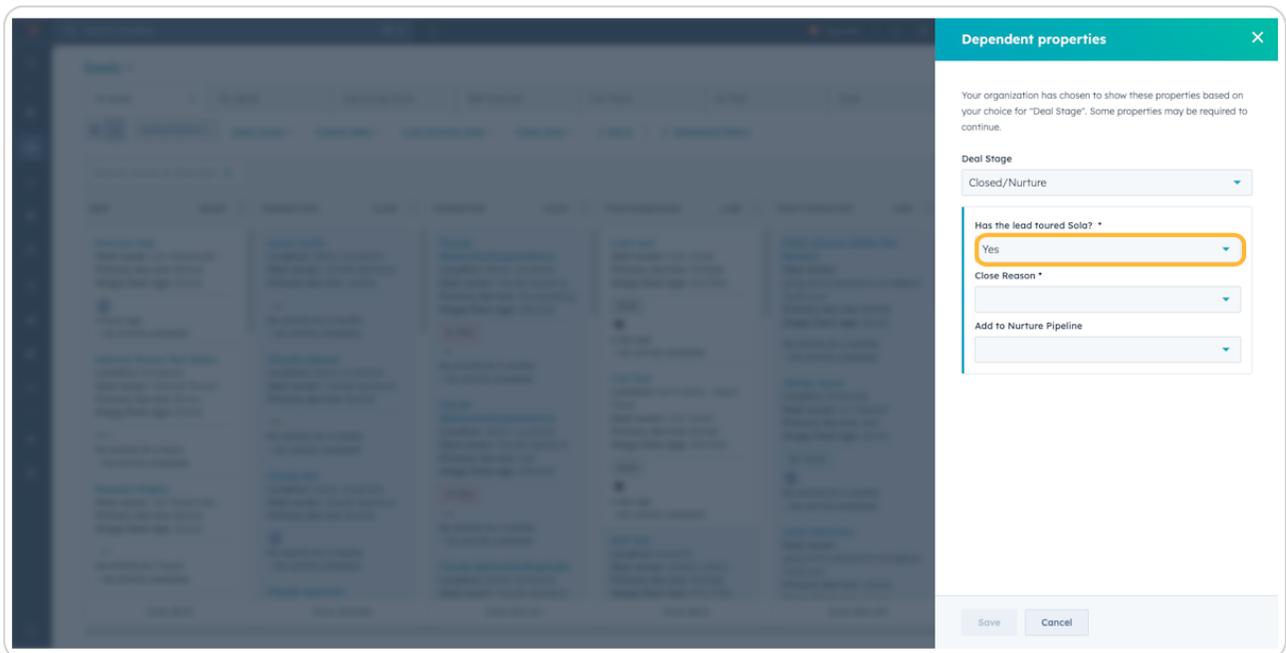
Has the lead toured Sola? *

Close Reason *

Add to Nurture Pipeline

STEP 11

Click on Yes or No



Dependent properties X

Your organization has chosen to show these properties based on your choice for "Deal Stage". Some properties may be required to continue.

Deal Stage

Closed/Nurture

Has the lead toured Sola? *

Yes

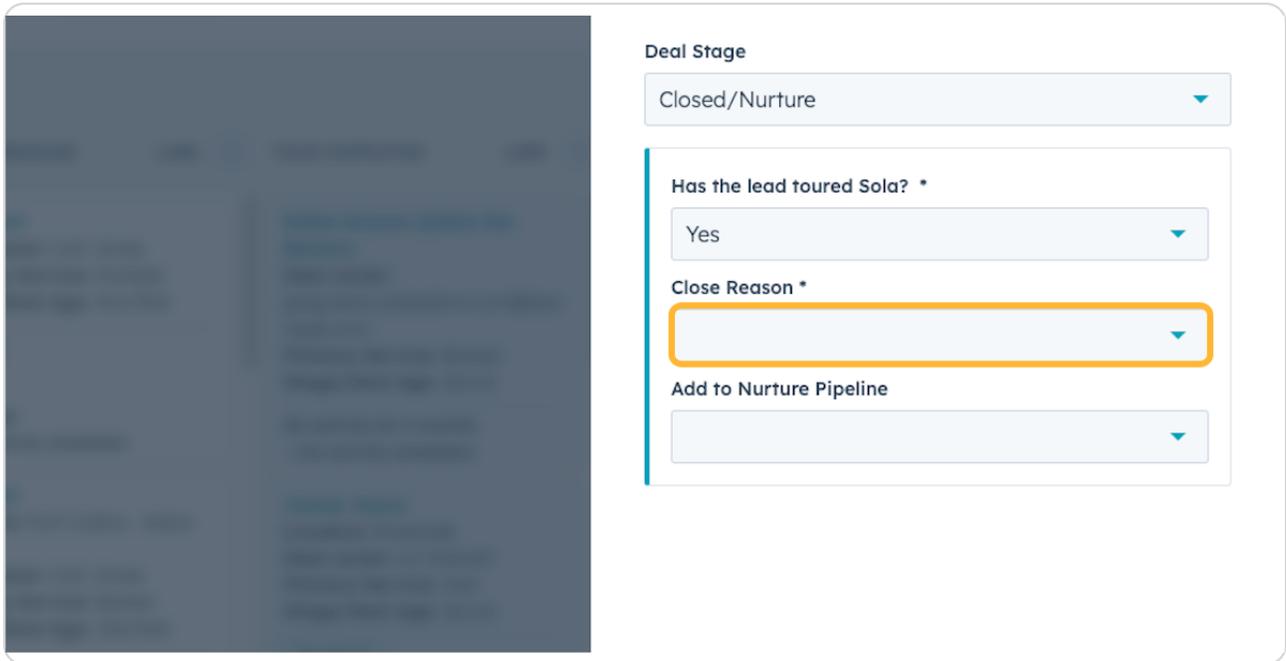
Close Reason *

Add to Nurture Pipeline

Save Cancel

STEP 12

Click on Close Reason



The image shows a screenshot of a CRM form. On the left, there is a blurred list of items. On the right, there is a form with several fields:

- Deal Stage**: A dropdown menu with the selected value "Closed/Nurture".
- Has the lead toured Sola? ***: A dropdown menu with the selected value "Yes".
- Close Reason ***: A dropdown menu that is highlighted with a yellow border.
- Add to Nurture Pipeline**: A dropdown menu.

STEP 13

Choose the Close Reason from the drop down

Note: The Add to The Nurture Pipeline will appear for every option. There will be times (for example a duplicate contact or a vendor) that you would not want to add those Deals to the Nurture Pipeline.

You should move almost all of your Deals into the Nurture Pipeline unless there's valid reason why the Deal shouldn't be in the Nurture Pipeline.

Dependent properties

Your organization has chosen to show these properties based on your choice for "Deal Stage". Some properties may be required to continue.

Deal Stage
Closed/Nurture

Has the lead toured Sala? *
Yes

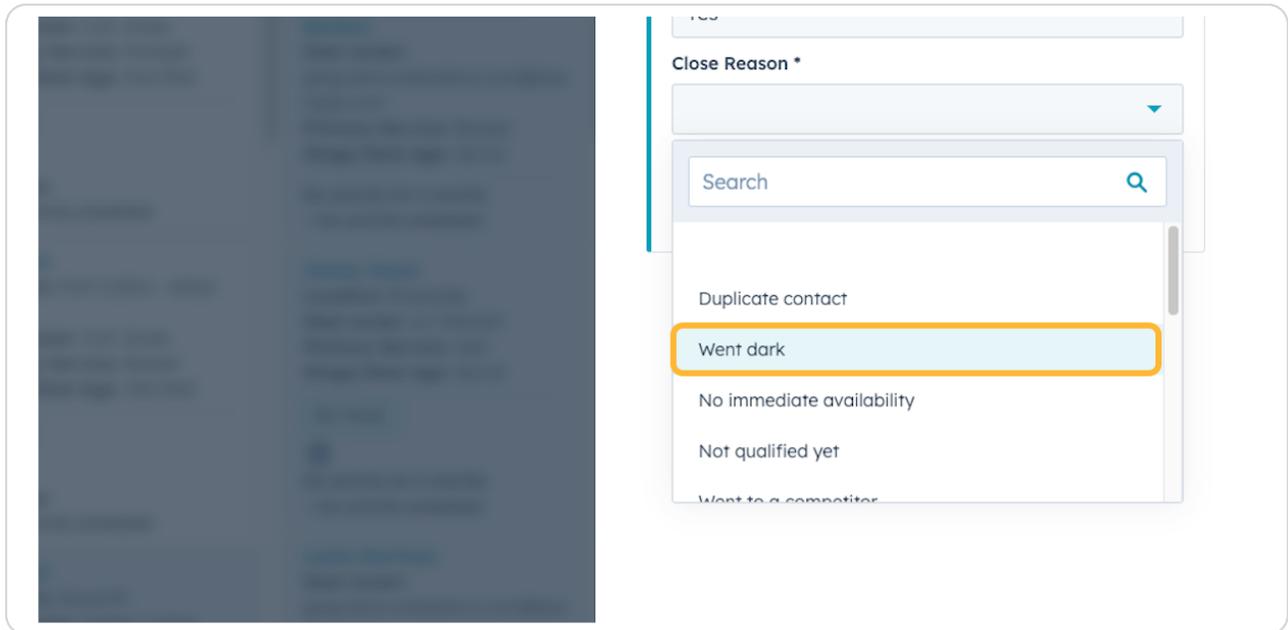
Close Reason *
Search

- Duplicate contact
- Went dark
- No immediate availability
- Not qualified yet

Save Cancel

STEP 14

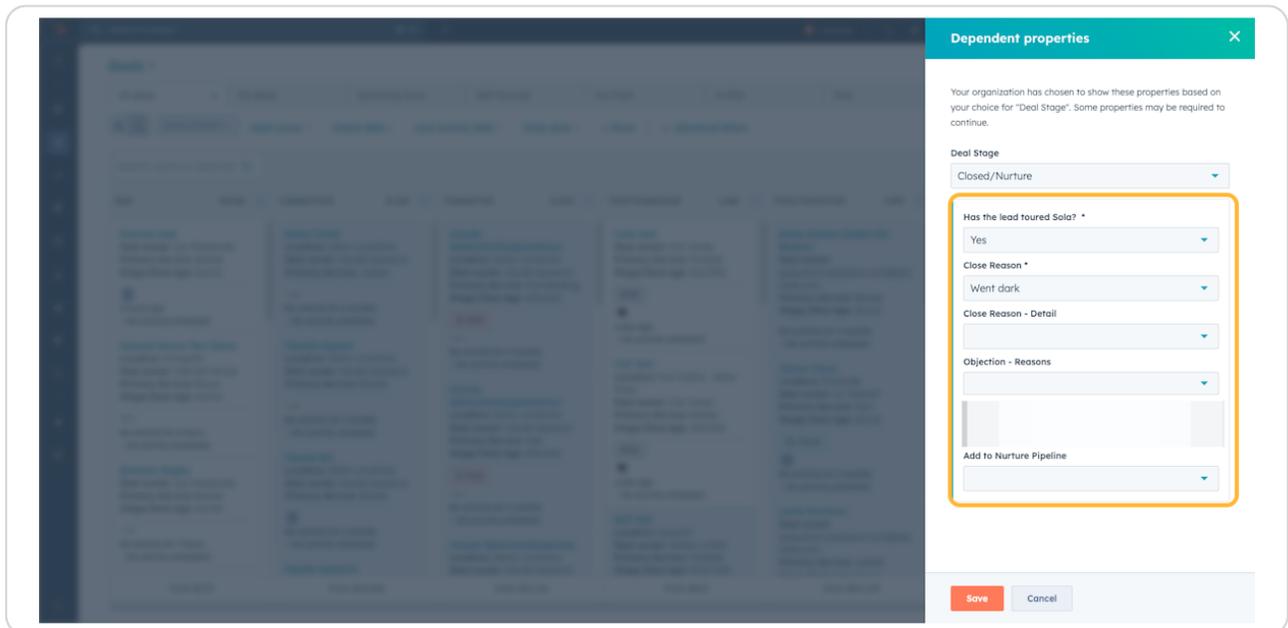
Click on Went Dark



STEP 15

This Close Reason will prompt you to answer more questions about the Deal

Note: The blurred section is a dropdown configuration that you do not need to worry about.



STEP 16

Update the Close Reason - Detail and Objection - Reasons

Dependent properties ✕

Your organization has chosen to show these properties based on your choice for "Deal Stage". Some properties may be required to continue.

Deal Stage
Closed/Nurture

Has the lead toured Solo? *
Yes

Close Reason *
Went dark

Close Reason - Detail
Stopped Responding during Sales Process

Objection - Reasons
Contract Terms ✕

Add to Nurture Pipeline

Save Cancel

STEP 17

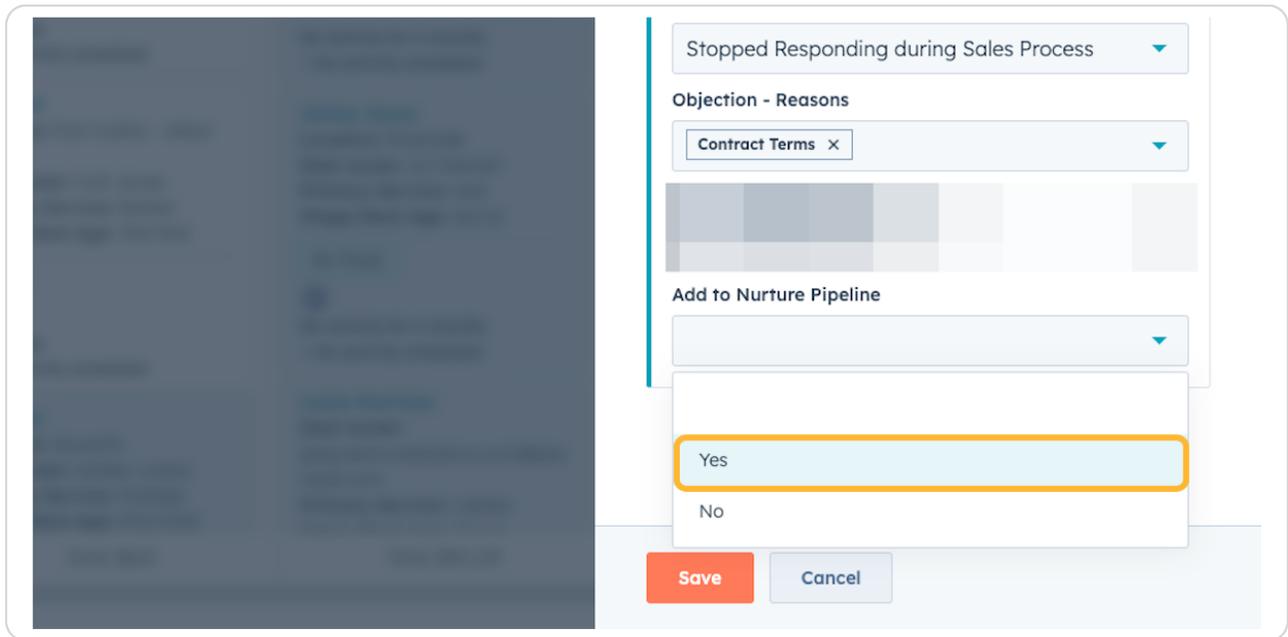
Click on Add to Nurture Pipeline

Add to Nurture Pipeline

Save Cancel

STEP 18

Click on Yes



Stopped Responding during Sales Process

Objection - Reasons

Contract Terms x

Add to Nurture Pipeline

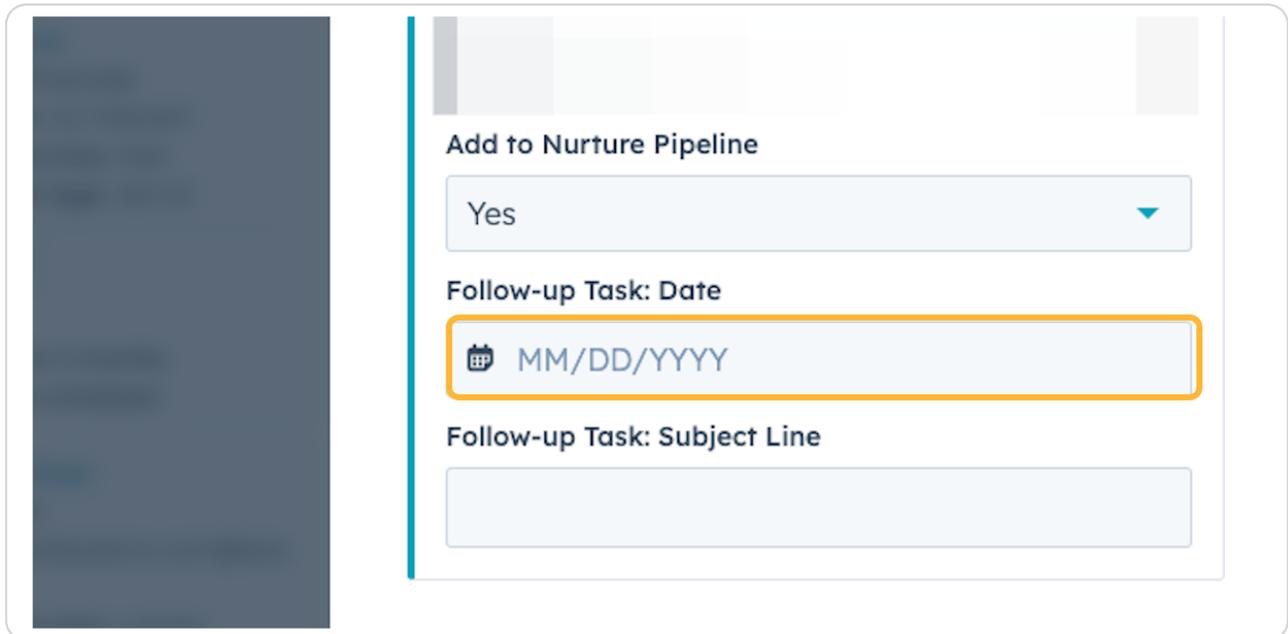
Yes

No

Save Cancel

STEP 19

If you add the Deal to the Nurture Pipeline, you'll be prompted to include a Follow-up Task. Click on Follow-up Task: Date



Add to Nurture Pipeline

Yes

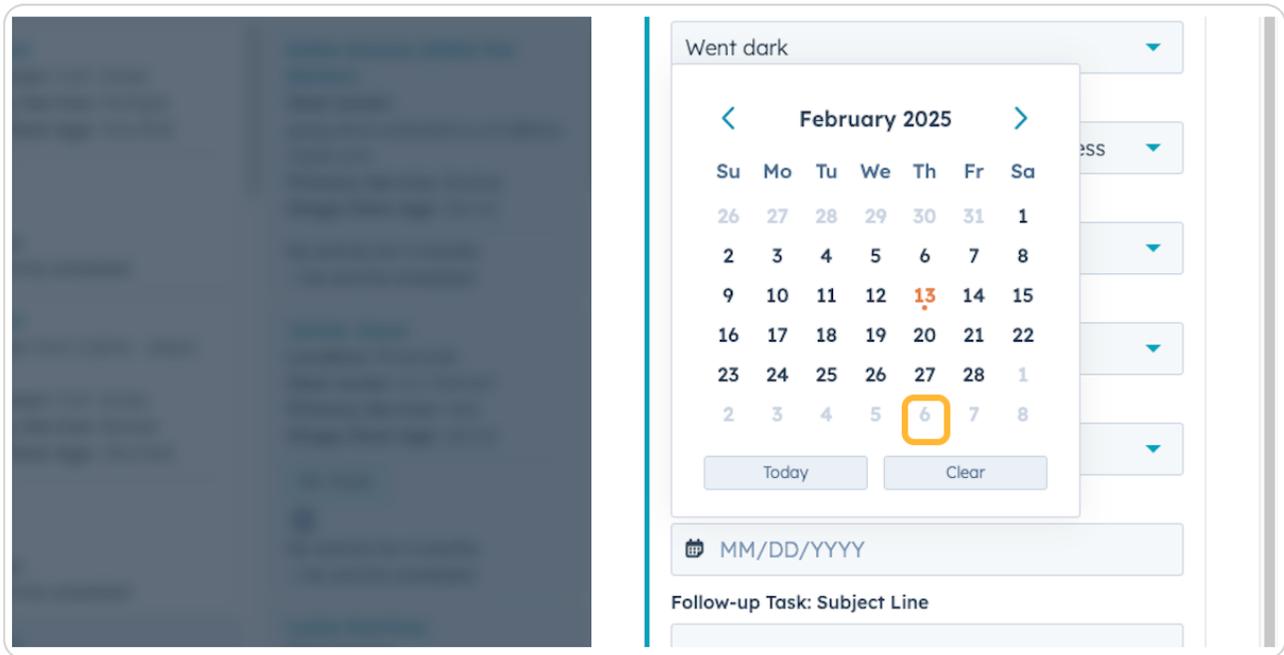
Follow-up Task: Date

MM/DD/YYYY

Follow-up Task: Subject Line

STEP 20

Select a date to follow up with the Pro



The screenshot shows a date selection interface. On the left is a blurred dark area. On the right, a calendar for February 2025 is displayed. The date '6' is highlighted with an orange circle. Below the calendar is a date input field with a calendar icon and the placeholder text 'MM/DD/YYYY'. Below that is a text field labeled 'Follow-up Task: Subject Line'.

Su	Mo	Tu	We	Th	Fr	Sa
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	1
2	3	4	5	6	7	8

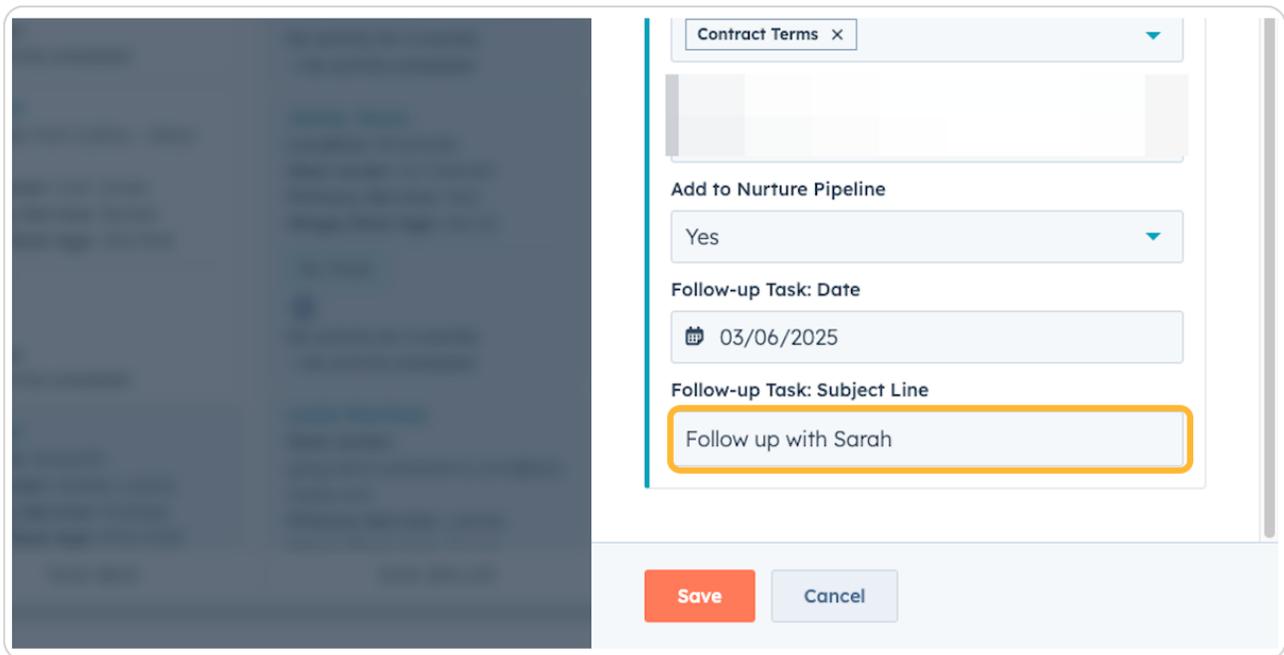
Today Clear

MM/DD/YYYY

Follow-up Task: Subject Line

STEP 21

Include a Subject Line for your task



The screenshot shows a task configuration form. At the top is a dropdown menu with 'Contract Terms' and a close icon. Below is a blurred dark area. Further down is a dropdown menu labeled 'Add to Nurture Pipeline' with 'Yes' selected. Below that is a date input field labeled 'Follow-up Task: Date' with the value '03/06/2025'. Below that is a text field labeled 'Follow-up Task: Subject Line' containing the text 'Follow up with Sarah', which is highlighted with an orange border. At the bottom are 'Save' and 'Cancel' buttons.

Contract Terms X

Add to Nurture Pipeline

Yes

Follow-up Task: Date

03/06/2025

Follow-up Task: Subject Line

Follow up with Sarah

Save Cancel

STEP 22

Click on Save

The screenshot shows a modal window titled "Contract Terms" with a close button (X). The form contains the following fields:

- Add to Nurture Pipeline:** A dropdown menu with "Yes" selected.
- Follow-up Task: Date:** A date field containing "03/06/2025".
- Follow-up Task: Subject Line:** A text field containing "Follow up with Sarah".

At the bottom of the modal are two buttons: "Save" (highlighted in orange) and "Cancel".

STEP 23

Your Deal will be moved into the Stage: Closed/Nurture and will be added to the Nurture Pipeline

The screenshot displays the HubSpot Deals dashboard. The main view shows a grid of deal cards categorized by stage: NEW (58,567), CONNECTING (21,258), CONNECTED (13,543), TOUR SCHEDULED (1,486), and TOUR COMPLETED (1,895). A deal card for "Eddie Alvarez (Eddie the Barber)" is highlighted, showing it is in the "Closed/Nurture" stage. A red box highlights the "Closed/Nurture" stage label in the deal card.

On the right side, a detailed view of the deal "Demo Location2: Sarah Doe" is shown. The deal summary includes:

- Amount: --
- Close Date: 02/13/2025
- Stage: Closed/Nurture
- Pipeline: Leasing Pipeline

The deal summary also shows a "Deal Summary" section with a "Deal stage: Closed/Nurture" label and a "FOR A FEW SECONDS" warning. Below this, there are several checkmarks in a row, indicating the deal's status across different metrics. At the bottom of the deal view are "Save", "Cancel", and "View record" buttons.

Accessing the Nurture Pipeline

5 Steps

The Nurture Pipeline has your back. When you close deals and add appropriate information on why the time wasn't right, the Nurture Pipeline will pick up where you left off. Deals will automatically be enrolled in the Nurturing - Stay Connected Drip. This drop will help re-engage lost or cold leads on your behalf by sending them monthly enticing seasonal and Sola-specific messaging.

STEP 24

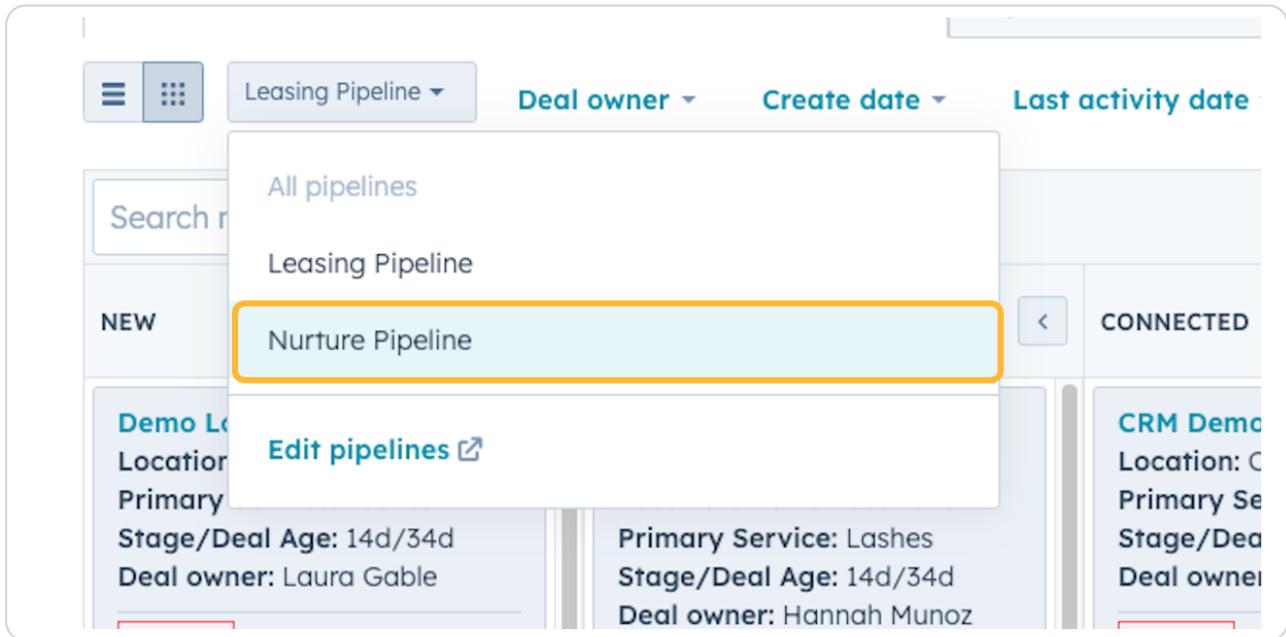
Click on the Leasing Pipeline dropdown towards the top of the Deal Overview page

The screenshot shows the HubSpot Deals overview page. At the top, there is a search bar and navigation tabs for 'All deals', 'My deals', 'Upcoming Tours', 'Self-Sourced', 'On-Track', 'At-Risk', 'Slow', and 'Online Deals'. A dropdown menu is open, showing 'Leasing Pipeline' selected. Below the navigation, there are filters for 'Deal owner', 'Create date', 'Last activity date', 'Close date', and 'Advanced filters'. The main content area displays a grid of deal cards across different stages: NEW (58,567), CONNECTING (21,238), CONNECTED (15,545), TOUR SCHEDULED (1,486), TOUR COMPLETED (1,895), WAITLIST (4,799), and CLOSED LEASED (8,799). Each card shows deal details like name, owner, location, and primary service, along with activity status and scheduled dates. A total value is shown at the bottom of each column.

NEW	CONNECTING	CONNECTED	TOUR SCHEDULED	TOUR COMPLETED	WAITLIST	CLOSED LEASED
58,567	21,238	15,545	1,486	1,895	4,799	8,799

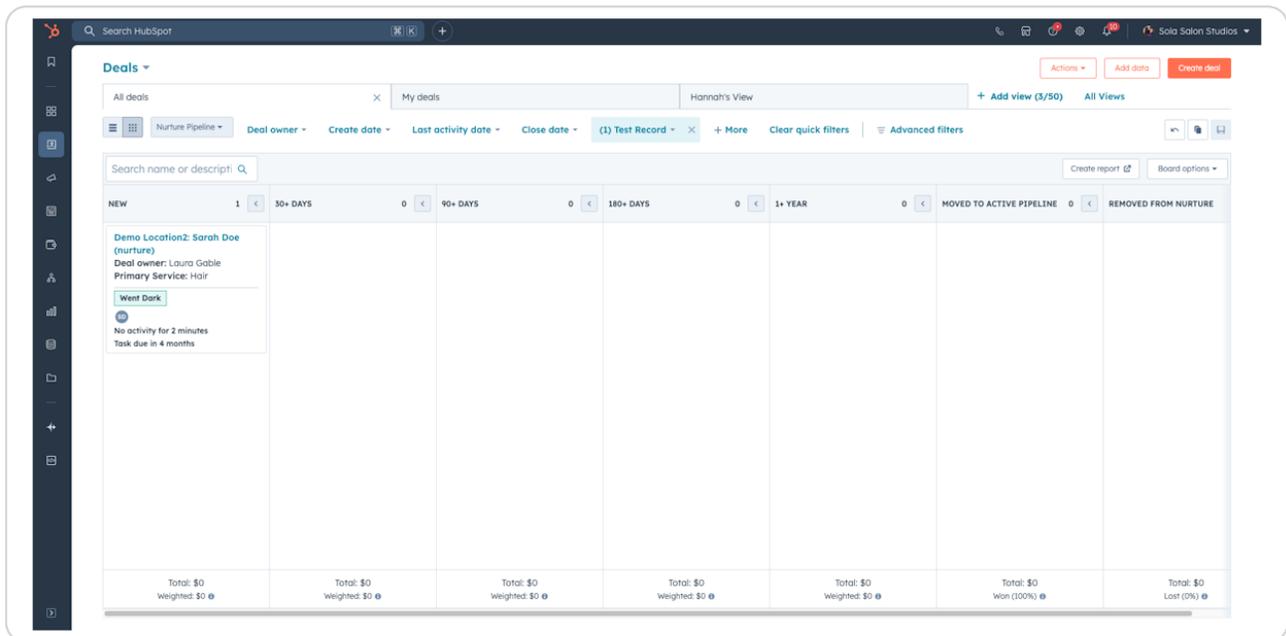
STEP 25

Click on Nurture Pipeline



STEP 26

Switching the Pipeline will bring you into the Nurture Pipeline. Here you'll see the Deals you have added.



STEP 27

Accessing a Deal in the Nurture Pipeline works the same as a Deal in the Leasing Pipeline. Click on the Deal Card

The screenshot shows the HubSpot Deals interface. At the top, there's a search bar and navigation tabs for 'All deals', 'My deals', and 'Hannah's View'. Below that, there are filters for 'Nurture Pipeline', 'Deal owner', 'Create date', 'Last activity date', and 'Close date'. A search bar is also present. The main area is a table with columns for deal stages: NEW, 30+ DAYS, 90+ DAYS, 180+ DAYS, 1+ YEAR, MOVED TO ACTIVE PIPELINE, and REMOVED FROM NURTURE. The first deal card is highlighted with a yellow box. It contains the following information: 'Demo Location2: Sarah Doe (nurture)', 'Deal owner: Laura Gable', 'Primary Service: Hair', a 'Went Dark' status, and 'No activity for 2 minutes' and 'Task due in 4 months'. At the bottom of the table, there are summary rows for each stage, showing 'Total: \$0' and 'Weighted: \$0'.

STEP 28

The Deal Card Preview will appear on the right-hand side

The screenshot shows the HubSpot Deals interface with a deal card preview open on the right-hand side. The preview is titled 'Demo Location2: Sarah Doe (nurture)'. It displays the following information: 'Amount: --', 'Close Date: MM/DD/YYYY', 'Stage: New', and 'Pipeline: Nurture Pipeline'. There are icons for 'Note', 'Email', 'Call', 'Task', 'Meeting', and 'More'. Below that, there's a 'Deal Summary' section with a 'Hair' tag and an 'Edit Deal' link. The 'Deal stage' is 'New' with a progress bar showing 'FOR 3 MINUTES'. Other details include 'Stage/Deal Age', 'Location: + Add Location', 'Contact: Sarah Doe', 'Tour Date: Schedule Now', 'Toured Solo? Yes', and 'Deal Owner: Laura Gable'. At the bottom of the preview, there are 'Save', 'Cancel', and 'View record' buttons. The main table from the previous screenshot is visible in the background, with the first deal card still highlighted.

Moving a Deal from the Nurture Pipeline Back Into... 8 Steps

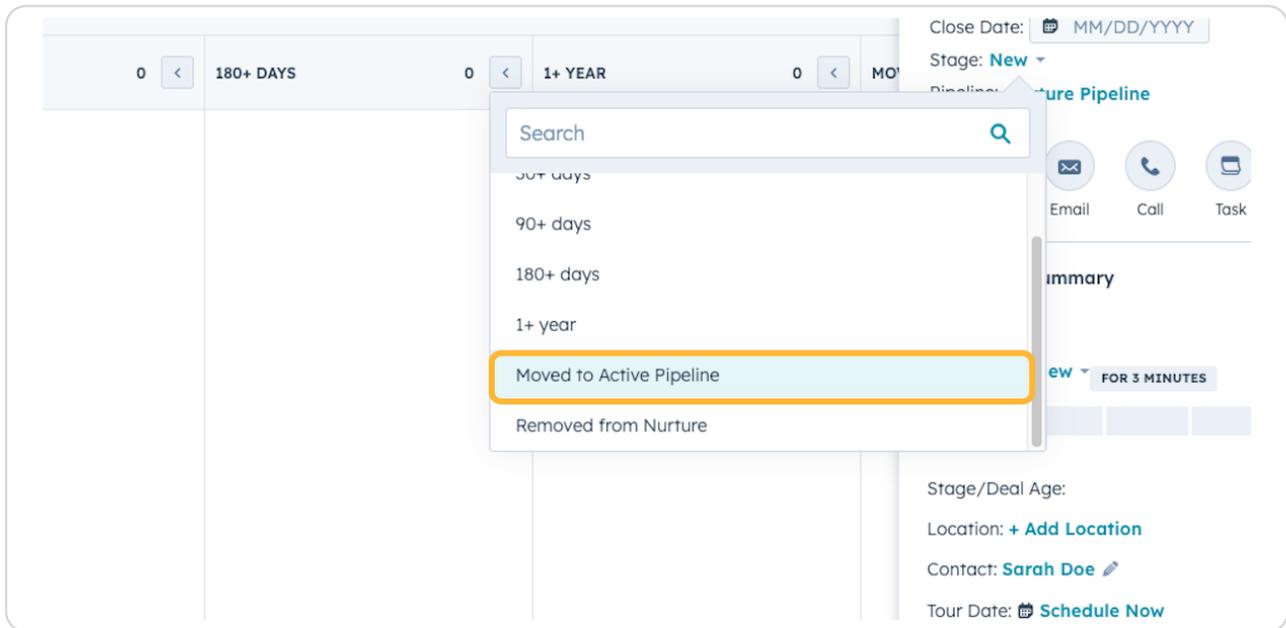
STEP 29

In the Deal, navigate to the Stage dropdown

The screenshot shows a CRM interface for a deal record. On the left, there are filter options: 'Clear quick filters', 'Advanced filters', and a table with '1+ YEAR', '0', and '<' buttons. The main content area displays the deal title 'Demo Location2: Sarah Doe (nurture)'. Below the title, the following details are shown: 'Amount: --', 'Close Date: MM/DD/YYYY', 'Stage: New' (highlighted with an orange box), and 'Pipeline: Nurture Pipeline'. At the bottom, there are five circular action buttons: 'Note', 'Email', 'Call', 'Task', and 'Meeting'. A 'Deal Summary' section is partially visible at the bottom.

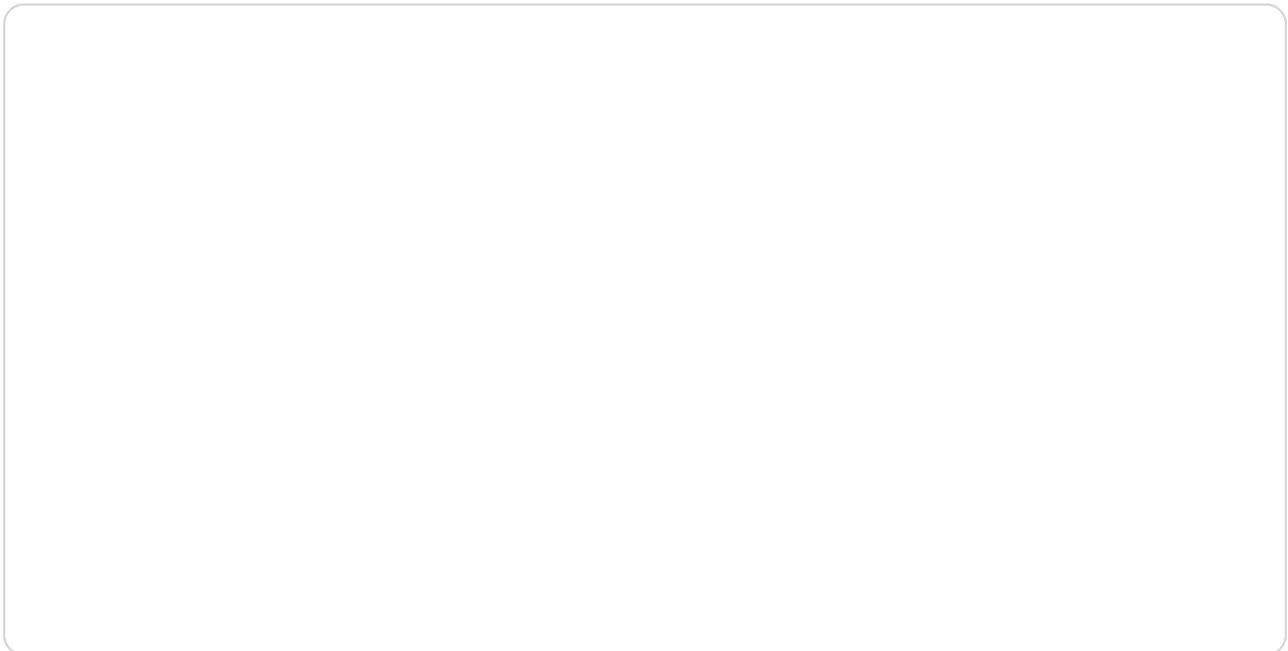
STEP 30

Click on the drop down and Click Moved to Active Pipeline



STEP 31

You'll be prompted to answer a few questions so that the Deal goes back into the right area of the Leasing Pipeline



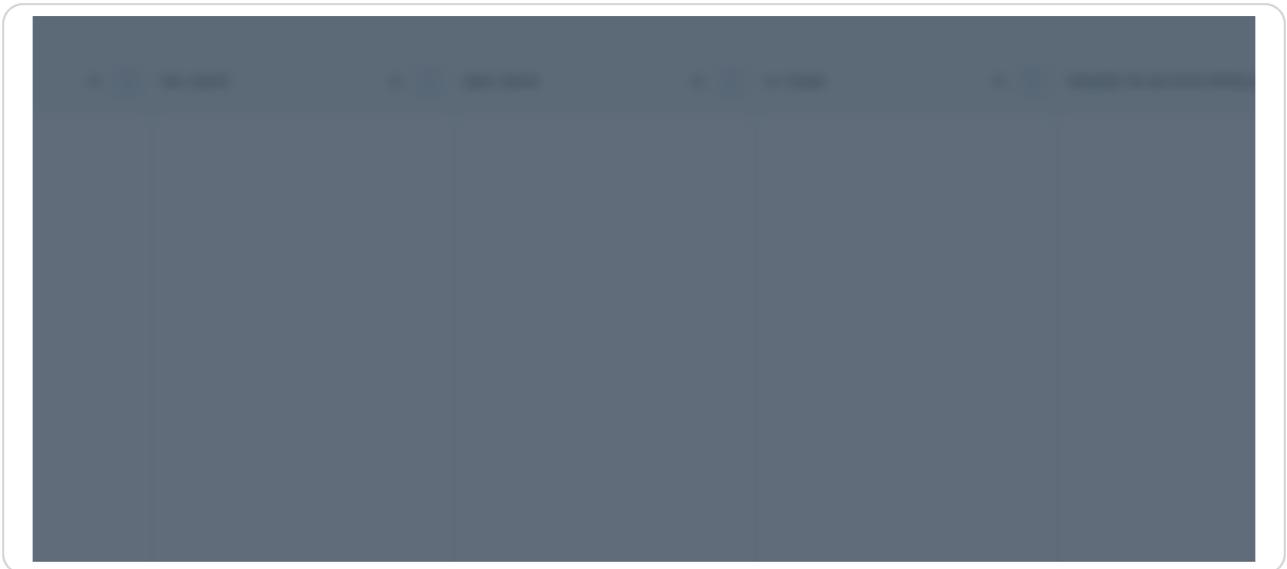
STEP 32

Fill out the Nurture Reactivate Stage (all but New will appear as options), update the Location Name, Primary Service, when they are Looking to Move, and the Current Situation



STEP 33

Click Save



STEP 34

The Deal will be updated and moved back into the Leasing Pipeline

The screenshot shows the HubSpot Deals interface. At the top, there's a search bar and a notification: "Success. Your changes were updated." Below that, the "Deals" view is set to "My deals" with a filter for "Nurture Pipeline". The table shows columns for deal stages: NEW, 30+ DAYS, 90+ DAYS, 180+ DAYS, 1+ YEAR, and MOVED TO ACTIVE PIPELINE. The deal "Demo Location2: Sarah Doe (nurture)" is highlighted in the "MOVED TO ACTIVE PIPELINE" column. The right-hand panel shows the deal details, including the owner "Laura Gable", the primary service "Hair", and the current stage "Moved to Active Pipeline".

STEP 35

Go to the pipeline dropdown and Select Leasing Pipeline

This is a close-up view of the pipeline dropdown menu in the HubSpot Deals interface. The menu is open, showing several pipeline options: "90+ DAYS", "180+ DAYS", "1+ YEAR", and "MOVED TO ACTIVE PIPELINE". The "MOVED TO ACTIVE PIPELINE" option is currently selected and highlighted with a blue background. The deal card for "Demo Location2: Sarah Doe (nurture)" is visible in the background, showing details like the owner "Laura Gable" and the primary service "Hair".

STEP 36

We'll see the Deal back in the Connected Stage with (re-engaged) in the name and a Re-Engaged tag on the Deal

23,488 <	CONNECTED 15,173 <	TOUR SCHEDULED 1,741 <	TOUR COMPLETED 2,220 <	WAITLIST
ngs ir /1d Thomas	<p>Demo Location2: Sarah Doe (re-engaged) Primary Service: Hair Stage/Deal Age: 0d/1d Deal owner: Laura Gable</p> <p>Re-Engaged</p> <p>SD No activity for a minute Task due in 4 months</p>	<p>North Scottsdale: Kayla higuere Location: North Scottsdale Primary Service: Other Stage/Deal Age: 0d/1d Deal owner: Avery Gavigan</p> <p>KH Email 4 hours ago Task due in 8 hours</p> <p>Natick: Tiffany Korbani Location: Natick Primary Service: Massage Stage/Deal Age: 0d/0d Deal owner: Candice Lin</p> <p>TK No activity for 11 hours Task due in 8 hours</p>	<p>Paradise Valley Village: Ori keha Location: Paradise Valley Village Primary Service: Skincare Stage/Deal Age: 0d/0d Deal owner: Avery Gavigan</p> <p>OK No activity for 10 hours : No activity scheduled</p> <p>Medford Oregon: David Peterson Location: Medford Oregon Primary Service: Other Stage/Deal Age: 0d/0d Deal owner: Jeff Barison</p> <p>DP</p>	<p>Bellevue: Soledad Dia Location: Bellevue Primary Service: Multi Stage/Deal Age: 0d/0d Deal owner: Dan Hoed</p> <p>Multi</p> <p>SD Task 16 hours ago : No activity scheduled</p> <p>Crown Point: Britney D Location: Crown Point Primary Service: Hair Stage/Deal Age: 0d/1d Deal owner: Ashlee He</p> <p>BD</p>
ngs ber /1d Thomas	<p>Newtown: Kay Smith Location: Newtown Primary Service: Barber Stage/Deal Age: 0d/1d Deal owner: Scott Sysler</p> <p>KS Task 14 minutes ago</p>			

