



Client Journey Tracker

From Corporate to Closing: Building a Luxury Real Estate Career from Scratch | By Ahmed Elsheikh

Track every touchpoint with your client from first contact to deal closure and beyond. A clear journey ensures nothing falls through the cracks.

Client Overview

Client Name

Client Type (Buyer / Seller / Both)

Segment (Luxury / Mid / Off-Plan)

First Contact Date

Source (Referral / Cold / Portal)

Agent Name

Stage 1: First Contact & Introduction

Action	Date	Status	Notes
Initial message / call			
Introduction & credentials shared			
Added value communicated			
Phone call scheduled			
First meeting confirmed			

Stage 2: Discovery & Preparation

Action	Date	Status	Notes
Client needs & goals understood			
Budget and financing confirmed			
Segment & area preferences noted			
Shortlist of properties prepared			
Market data & comparables compiled			

Stage 3: Viewings & Presentations

Action	Date	Status	Notes
Viewing 1			
Viewing 2			
Viewing 3			
Client feedback captured			
Shortlist narrowed			

Stage 4: Negotiation & Offer

Action	Date	Status	Notes
Offer submitted			
Counter-offer received			
Terms agreed			
MOU / Form F signed			
Deposit collected			

Stage 5: Closing & Transfer

Action	Date	Status	Notes
NOC applied for			
NOC received			
Transfer date scheduled			
Final payment confirmed			
DLD transfer completed			
Keys handed over			

Stage 6: Post-Deal Relationship

Action	Date	Status	Notes
Thank you message sent			
DLD rating requested			
1-week follow-up call			
1-month check-in			
3-month relationship touchpoint			
Referral conversation initiated			

Promises Made & Delivered

Promise	Date Made	Deadline	Delivered (Y/N)

Tip: Always set a timeline with your client and track every promise you make. The moment you stop delivering on commitments is the moment you start losing trust.