

Client Discovery Questionnaire

Advise, Don't Sell: Building Trust, Pipelines & Lasting Client Relationships | By

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Before you recommend a single unit, understand the person. The best unit is an abstract concept — it only exists relative to your client's real requirements. Use this sheet to listen first, surface what they are not telling you, and advise instead of pitch.

Agent Name

Client Name

Date

Target Area

1. Understand the Profile

Know who you are advising before you talk price. Adjust your language to their background so there is no gap in communication.

- ☐ Client type: Investor | End-user | Institutional (circle one)
- ☐ Is this their first transaction in Dubai? Yes / No
- ☐ Are they buying from abroad or based locally?
- ☐ What is their financial / professional background?
- ☐ Are they primarily data-driven or led by the emotional component?

2. Stated Requirements

Capture exactly what they say they want — in their words, not yours.

Budget range & payment preference (cash / mortgage / plan):

Preferred area(s) and unit type:

Timeline to transact:

Yield expectation vs. capital appreciation vs. lifestyle:

3. The Unspoken Drivers

Listen for what they are not telling you that might be the real decision factor.

What is the underlying reason for this purchase?

Which fear or hesitation is sitting under the surface?

4. Define “The Best Unit” — For This Client

Rank what actually matters to *them*. Match the list of requirements to available opportunities.

Decision factor	Priority (1 = highest)
Net yield / rental return	
Capital appreciation potential	
Prime location / view	
Building ecosystem & supply nearby	
Lifestyle / end-use comfort	

5. Advisor Notes & Market Gaps

Where do they misread the market? Note where you need to inform or reframe with data, not pressure.

Where their expectation differs from current market reality:

Comparable transactions / supply data to share with them:

Tip: *Don't pitch in the first conversation. When you listen and inform instead of sell, you stop being a salesperson and become someone they trust — and trust is what turns one deal into a long-term relationship.*