

Pipeline Builder Template

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

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You should never feel the pressure of a single deal. The way out of that pressure is a pipeline — many opportunities aligned at the same time, so if one transaction does not happen, you simply focus on the others. Build it deliberately, week after week.

Agent Name

Week Of

Target Segment

Target Area

1. Weekly Opportunity Tracker

Keep multiple opportunities moving at once. The goal is alignment, not a single bet.

Opportunity / Client	Type	Stage	Next action

2. Stay on the Pulse — Information Sources

Information can come from anywhere. Connect the dots across sources to see the big picture and where the next opportunity will come from.

- ☐ Checked in with management this week
- ☐ Spoke with developers — new launches & incoming supply
- ☐ Stayed in touch with a few close agents on market movement
- ☐ Reviewed latest transaction & pricing data for my area
- ☐ Gathered signals directly from clients
- ☐ Spent focused time in the office to capture information

3. Match-Making Board

Sometimes matching the right buyer with the right seller closes the deal — not chasing one specific property.

Buyers & their requirements	Sellers / inventory to match
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4. This Week’s Priorities

Anticipate and organise. Attend to high-priority tasks first — and delegate to the team so you are never overwhelmed.

High-priority task	Delegate to

Tip: *You are as strong as your team. Help colleagues with their challenges and you learn the market faster, get support back, and remove the barrier of seeing them as competition — the market is big enough for everyone.*