

FOLLOW-UP + RELATIONSHIP DEVELOPMENT WORKBOOK

30-Day Real Estate Pipeline Builder

A practical system to prioritize follow-up, create useful conversations, and build momentum before January.

Build the Pipeline Before You Need It

This workbook is designed to help you create a focused 30-day follow-up rhythm using relationships and opportunities already connected to your business.

01 START WITH RELATIONSHIPS

Begin with people you already know or have already connected with. A stronger pipeline does not always require a brand-new lead source.

02 PRIORITIZE, DON'T BLAST

Choose the contacts where you have context, a relevant reason to reach out, and a useful next step. Avoid mass, generic outreach.

03 GIVE EVERY CONTACT A NEXT ACTION

A pipeline becomes easier to manage when every active relationship has a clear next step and a date attached to it.

04 REVIEW THE ACTIVITY, NOT JUST CLOSINGS

Track conversations, follow-ups, appointments, referrals, and next actions. Those are the behaviors you can control this month.

YOUR 30-DAY OUTCOME

At the end of this workbook, you should know exactly who deserves your attention first, what kind of conversation makes sense, what happens next, and which follow-up rhythm you want to carry forward.

My primary goal for the next 30 days:

Take a Snapshot of Your Current Pipeline

Use your CRM, phone, notes, email, or memory to estimate what is already in motion. The goal is not a perfect count. It is to see where follow-up is missing.

PIPELINE STAGE	WHAT IT MEANS	COUNT
ACTIVE	Currently in a transaction, appointment process, or active buyer / seller search.	-----
WARM	Has expressed interest or a likely move, but timing or next step is not yet firm.	-----
NURTURE	A real relationship or lead that may become business later with continued contact.	-----
RECONNECT	Past client, sphere contact, referral relationship, or older lead that has gone quiet.	-----
NO NEXT ACTION	A contact with potential value, but no specific follow-up step currently scheduled.	-----

QUICK NUMBERS

Past clients not contacted in the last 6 months -----

Paused buyers / sellers -----

Open house / online leads without a clear next action -----

People in my sphere I should reconnect with -----

WHAT STANDS OUT?

Where is the clearest follow-up opportunity in your current pipeline?

Build Your Relationship Priority Map

Choose 30 people where a thoughtful conversation could be useful. Prioritize context and relevance over database size.

A High priority

A clear reason to reach out + likely near-term next step.

B Medium priority

A useful reason to reconnect + future potential.

C Nurture

Important relationship, but no immediate real estate need.

#	NAME	PRIORITY
1		A / B / C
2		A / B / C
3		A / B / C
4		A / B / C
5		A / B / C
6		A / B / C
7		A / B / C
8		A / B / C
9		A / B / C
10		A / B / C
11		A / B / C
12		A / B / C
13		A / B / C
14		A / B / C
15		A / B / C

#	NAME	PRIORITY
16		A / B / C
17		A / B / C
18		A / B / C
19		A / B / C
20		A / B / C
21		A / B / C
22		A / B / C
23		A / B / C
24		A / B / C
25		A / B / C
26		A / B / C
27		A / B / C
28		A / B / C
29		A / B / C
30		A / B / C

Create a Follow-Up Matrix

Use this page for your highest-priority relationships. Every contact should leave this page with a specific next action and a date.

CONTACT	STAGE	REASON	CHANNEL	DATE	OUTCOME	NEXT ACTION	NEXT DATE

A USEFUL NEXT ACTION IS SPECIFIC

- Call Tuesday after 4 PM to ask whether timing has changed.
- Send a neighborhood update Thursday, then schedule a call next week.
- Text the open-house visitor a short check-in and confirm whether they are still looking.

12 Ready-to-Adapt Follow-Up Starters

Use these as starting points, not scripts you have to copy word for word. Personalize the message so it reflects the relationship and the reason you are reaching out.

1. Past Client Check-In

Hi [Name], I was thinking about you and wanted to check in. How are things going with the house and with you? Anything real estate-related you have been wondering about lately?

2. Past Client Market Update

Hi [Name], I was reviewing recent activity around [neighborhood / area] and thought of you. If you are curious, I would be happy to send you a quick update on what homes around you have been doing.

3. Paused Buyer

Hi [Name], when we last talked you were taking a break from the search. I wanted to check in and see whether anything has changed with your timing or priorities. No pressure at all, I just want to make sure I am useful when the time is right.

4. Potential Seller Who Said Later

Hi [Name], you mentioned earlier this year that selling might make more sense later. I wanted to check in before the holidays and see whether that is still on your radar or if your plans have changed.

Conversation Starters, Continued

Keep the message useful and natural. The goal is to reopen a conversation, not force a transaction.

5. Open House Follow-Up

Hi [Name], thanks again for stopping by the open house at [property]. I wanted to see what you thought after having some time to compare it with other options. Are you still exploring homes in the area?

6. Older Online Lead

Hi [Name], we connected a while back about real estate in [area]. I realized it has been some time since I checked in. Are you still considering a move, or has your plan changed?

7. Sphere Reconnection

Hi [Name], it has been too long. I wanted to say hello and see how you are doing. I have been spending some time reconnecting with people I enjoy knowing before the holidays get busy.

8. Referral Relationship

Hi [Name], I appreciate the people you have connected me with over time. I wanted to check in and see how you are doing. If there is ever someone I can help with a real estate question, I am always happy to be a resource.

Conversation Starters, Continued

Use the message that fits the relationship and your reason for reaching out. Keep the tone personal, useful, and low pressure.

9. Buyer Timing Check

Hi [Name], I wanted to revisit the timing we discussed for your move. Are you still thinking about [timeframe], or has anything changed that would be useful for me to know?

10. Seller Preparation Offer

Hi [Name], if selling is still something you may consider in the next few months, I can help you think through preparation before you are ready to list. Would a simple pre-listing planning conversation be useful?

11. Homeownership Resource

Hi [Name], I came across a resource / update related to [taxes, maintenance, neighborhood, value] and thought it might be useful to you. Want me to send it over?

12. Year-End Relationship Check-In

Hi [Name], before the end-of-year rush gets here, I wanted to check in and see how you are doing. I hope the year has treated you well. Anything I can be a resource for as you head into the next few months?

Work the Plan for Four Weeks

Each week has a different job. Keep the daily activity simple enough to repeat even when transactions, appointments, and client needs interrupt the schedule.

WEEK 1 · AUDIT + PRIORITIZE

Clean up the pipeline, choose priority contacts, and assign next actions.

- ☐ Pipeline cleanup
- ☐ Choose 20–30 priority relationships
- ☐ Schedule first follow-up blocks

WEEK 2 · RECONNECT

Focus on past clients, sphere, referral relationships, and quiet contacts.

- ☐ Past client check-ins
- ☐ Sphere reconnections
- ☐ Relationship value / resource touches

WEEK 3 · FOLLOW UP

Revisit warm leads, paused buyers / sellers, and recent inquiries.

- ☐ Buyer timing checks
- ☐ Seller preparation conversations
- ☐ Open house / online lead follow-up

WEEK 4 · REVIEW + CONTINUE

Identify what moved, schedule future nurture, and carry the system forward.

- ☐ Second follow-up where appropriate
- ☐ Schedule future next actions
- ☐ Complete month-end review

MY PROTECTED FOLLOW-UP BLOCK

Day(s): _____ Time: _____ Minimum length: _____

MY NON-NEGOTIABLE FOR THE NEXT 30 DAYS

Track the Activity That Creates Movement

Use the scorecard at the end of each week. The purpose is not to judge the week. It is to see which activities are creating conversations and where follow-up still needs attention.

METRIC	WEEK 1	WEEK 2	WEEK 3	WEEK 4
Meaningful conversations				
Follow-ups completed				
Appointments / consultations				
Referrals / introductions				
New next actions scheduled				
Contacts moved forward				

WEEKLY REFLECTION

Which conversation created the most movement this week?

Who still needs a next action?

What will I repeat next week?

Decide What Moves Forward Next Month

The goal of the 30 days is not to finish every relationship. It is to create clarity about what moved, what stalled, and what deserves continued attention.

What moved forward?

List the contacts, appointments, referrals, or opportunities that became clearer this month.

What stalled?

Which relationships still need a different message, timing, resource, or next step?

What should stay in nurture?

Which relationships matter, but do not need immediate follow-up?

What worked best?

Which conversation starters, channels, or follow-up blocks created the strongest response?

What will I continue next month?

Choose the smallest repeatable follow-up rhythm you want to carry forward.

MY CARRY-FORWARD PIPELINE

1.

2.

3.

4.

5.

6.

7.

8.

Keep the Momentum Going

A plan is useful. A plan you keep working is more valuable. Choose the support that matches the problem you are trying to solve next.

ELEVATE MEMBERSHIP

Need structure to keep working the plan?

Elevate provides ongoing weekly professional development focused on practical business skills, systems, database management, productivity, client experience, and consistent growth.



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FREE COACHING SESSION

Need a strategy built around your business?

Start with a FREE Coaching session for individualized support around lead generation, follow-up, conversion, systems, accountability, and your specific business goals.



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MY NEXT STEP