



Your Blueprint to a Profitable Sales Pipeline in 7 days

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Struggling to manage your leads effectively and close more deals? This 7-day plan is designed to help real estate agents like you take control of your sales pipeline, streamline your processes and maximise your results. Whether you're using spreadsheets or a CRM system, this blueprint will show you how to turn your pipeline into a well-oiled machine.



DAY 1

Audit your current pipeline



GOAL Identify the strengths and weaknesses of your existing pipeline.

Evaluate your enquiries:

- Are they **active**, **dormant**, or **irrelevant**?
- Do you have **accurate contact details** and relevant information?

Categorise your enquiries:

- Use segments like **Hot** (ready to act), **Warm** (interested but not ready) and **Cold** (dormant or unresponsive)

Identify gaps:

- Are follow-ups being **missed**?
- Is your data **disorganised** or **incomplete**?

Create a list of pipeline inefficiencies to address throughout the week such as:

- Enquiries that haven't been contacted in weeks or months
- Enquiries without key information (e.g. budget, preferred property type)
- Inconsistent or incomplete notes on conversations and interactions
- Duplicate or dormant enquiries
- No system for categorising enquiries as Hot, Warm, or Cold, making it difficult to focus on the most promising opportunities
- Manual handling of routine tasks, like follow-ups or appointment scheduling, leading to inefficiencies
- Enquiries stuck at specific stages, such as not being promptly converted to appraisals
- No clear overview of the pipeline status or stage distribution, making it hard to track progress

Define your ideal lead journey

GOAL :: Map out a clear, process to guide enquiries to a closed deal.

Simplify the journey:

- Step 1: Initial contact:** Enquiry comes in about a property (via phone, email, website or portal).

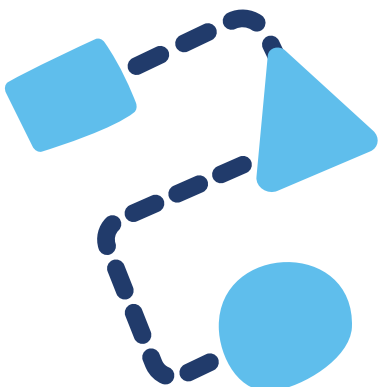
- Step 2: Qualification:** Establish the budget, requirements and readiness to act.

- Step 3: Engagement:** Provide tailored property recommendations or invite them to open homes.

- Step 4: Follow-up:** Address queries, overcome objections and keep them engaged.

- Step 5: Offer and negotiation:** Guide them through making an offer and negotiating terms.

- Step 6: Completion:** Finalise contracts and close the deal.



Spot bottlenecks or drop-off points:

- Are enquiries waiting too long for responses?

- Are you losing enquiries at the qualification stage because the process feels impersonal?

- Is there confusion during negotiations due to unclear communication?

Use clear communication:

- Avoid jargon that might add confusion.

- Explain processes in simple, client-friendly language to enhance their experience.

Streamline the experience:

- Use automation tools to schedule responses and follow-ups.

- Ensure all team members understand the enquiry journey and communicate consistently.

Prioritise follow-ups

GOAL : Focus your energy on the enquiries that are most likely to convert while ensuring no enquiry is neglected.

Segment and focus:

Hot:

- Immediate follow-ups are essential to keep momentum
- Arrange viewings, answer pressing questions and be proactive in addressing their needs

Warm:

- Schedule regular check-ins with nurturing messages to retain their interest
- Share updates on properties matching their preferences or market changes that might motivate them to act

Cold:

- Keep them engaged with occasional updates, such as new listings or market insights, without overwhelming them

Personalise outreach:

- Reference their specific preferences or past conversations
- Send tailored property recommendations that align with their needs

EXAMPLE

“Hi [Insert Name], you previously mentioned that you’re in the market for a property with [feature]. I’ve found a couple of new listings that might be perfect for you!”

Automate tasks:

Use CRM tools like Rex to:

- Set reminders for follow-ups so no enquiry falls through the cracks
- Automate emails or texts for lower priority leads, freeing up time to focus on Hot and Warm leads

EXAMPLE

Schedule a “thank you for your interest” email after an enquiry, followed by a reminder to reconnect if you don’t hear back within a week Explain processes in simple, client-friendly language to enhance their experience



Maximise enquiry engagement

GOAL :: Keep your enquiries interested and engaged throughout their journey

Warm and cold:

Warm Leads:

- **Send value-driven emails:** Share personalised property recommendations or insights into the local market that align with their preferences
- **Use stories to inspire action:** Include client success stories or testimonials to showcase how your expertise has helped others

EXAMPLE

“Hi [Name], the market is moving quickly in [area]. Here are a few properties that might be perfect for you”

Cold Leads:

- **Re-engage strategically:** Offer special incentives like exclusive early access to listings or discounts on fees
- **Reconnect around milestones:** Reach out during key events (e.g. holidays, new year) to subtly remind them of your services.

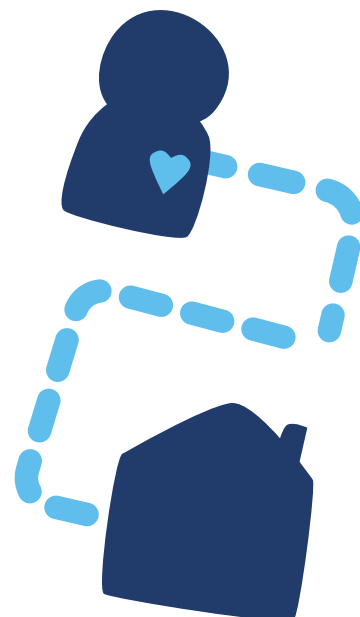
EXAMPLE

“Hi [Name], we have an exclusive open home this weekend for a property I think you’ll love—let me know if you’d like to attend!”

Track behaviours:

Use a CRM to monitor and act on:

- **Email opens and clicks:** Focus on enquiries who engage with your content
- **Property views:** Identify which listings are drawing attention and follow up with related properties or updates
- **Engagement trends:** Spot renewed activity from Cold enquiries (e.g. clicking on a newsletter link) and move them up in priority



Clean and organise your database

GOAL : Ensure your enquiry data is accurate and easy to manage.

Eliminate clutter:

- **Remove duplicate or outdated contacts:** Regularly review your database to identify and remove duplicate or outdated entries
- **Archive inactive enquiries:** Move enquiries that no longer align with your target audience to an archive folder to keep your active list clean

Regular maintenance:

- **Schedule regular clean-ups:** Set a monthly or quarterly schedule to review and clean your database
- **Use CRM tools:** Leverage your CRM's data management features to automate and simplify the cleaning process

Streamline data:

- **Group enquiries by key criteria:** Organise enquiries by location, budget or property type for quicker access and more targeted follow-ups
- **Standardise notes and tags:** Ensure all team members use consistent notes and tags to maintain clarity and uniformity across the database



Leverage CRM insights

GOAL Use analytics to refine your strategies and improve performance.

Analyse trends:

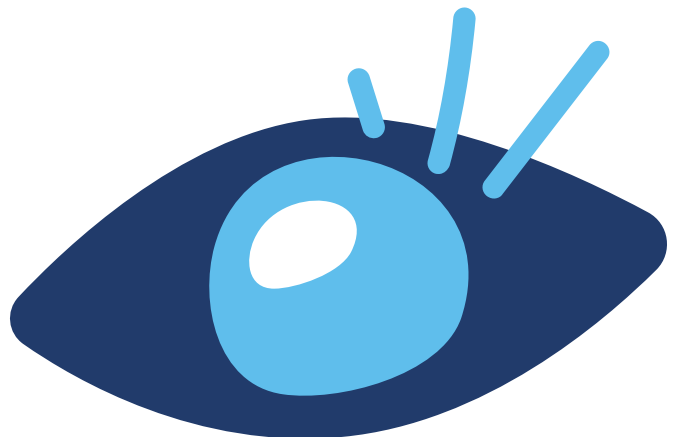
- **Identify enquiry sources:** Determine which sources bring in the most valuable enquiries and focus your efforts there (e.g. property portals, social media, referrals, networking events, etc.)
- **Spot conversion patterns:** Look for patterns in successful conversions to replicate effective strategies

Set KPIs:

- **Establish metrics:** Define key performance indicators such as average response time, enquiry conversion rates and time to sell

Refine your approach:

- **Adjust strategies based on data:** Use insights from your CRM to tweak your follow-up strategies or marketing efforts
- **Test and learn:** Implement A/B testing for different approaches and use the results to continuously improve (e.g. email frequency, personalised subject lines or incentives)



Build a sustainable follow-up system

GOAL Create a long-term plan to maintain a healthy pipeline.

Automate regular tasks:

- **Schedule follow-ups:** Use your CRM to schedule follow-up reminders such as quarterly check-ins with past clients, ensuring no lead is forgotten
- **Send personalised messages:** Automate birthday or property anniversary greetings to stay top of mind with past clients

Focus on retention:

- **Nurture past clients:** Regularly check in with past clients to encourage referrals and repeat business, such as quarterly newsletters or market updates
- **Offer value:** Provide ongoing value through market updates, property recommendations or exclusive/early access offers

Design a consistent workflow:

- **Develop a routine:** Establish a weekly routine for reviewing your pipeline and setting goals

EXAMPLE

Every Monday, review new enquiries and plan follow-up actions for the week

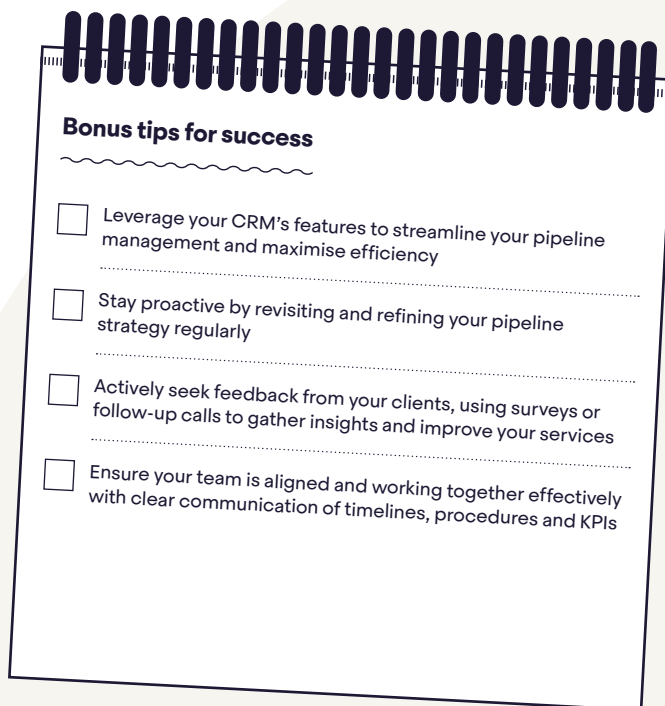
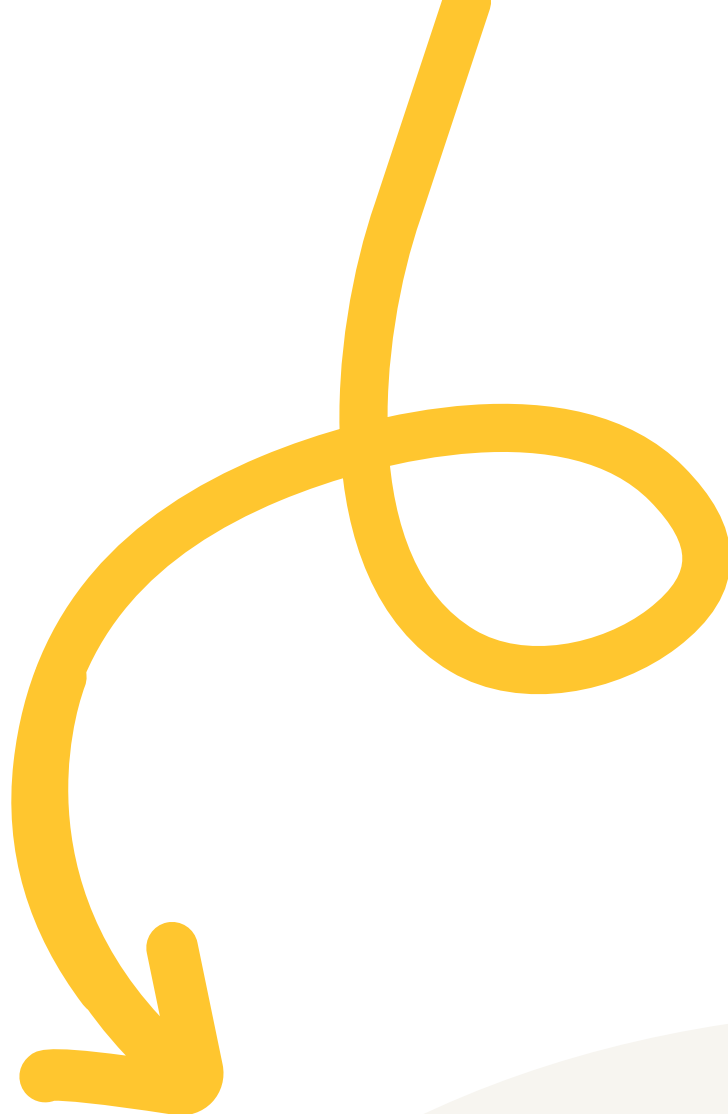


Conclusion

Building and maintaining a profitable sales pipeline doesn't have to be overwhelming. By following this structured 7-day plan, you can take control of your enquiry management, prioritise your efforts and unlock your full sales potential. Each step is designed to help you stay organised, build stronger relationships with your enquiries and close deals more efficiently.

With the right tools and strategies, you can turn your pipeline into a consistent source of success. If you're ready to make this process even easier, explore how Rex CRM's intelligent features can streamline every stage of your pipeline journey—from tracking interactions to automating follow-ups.

Take the first step today and see the difference a well-managed pipeline can make.





**Ready to take your
sales pipeline to the
next level?**

**Book a demo of Rex Software today at
www.rexsoftware.com/demo**