13 BD Pipeline Tracker (Weekly)

Rifat Sheikh | Law firm co-founder and former Head of BD & Marketing | Practitioner Educator

USE FOR: ALL SECTORS

HOW TO USE

Fictional practice entries only: names, firms and timings do not represent real contacts. Keep the live version in a firm-approved system with access, retention and opt-out controls. Never record sensitive matter details in a BD tracker.

Referral source	Sector and type	Stage	Fit	Next action	By when / note
Fictional Contact A (Example Accountancy)	Private: accountant	Active	High	Share a current employment update	Next week; confirm preferences
Fictional Contact B (Example Financial Advice)	Private: IFA	Building	Medium	Follow-up email with a relevant article	This month
Fictional Contact C (Example Estate Agency)	Private: estate agent	Aware	Medium	LinkedIn connection and follow-up message	This week; conveyancing overlap
Fictional Contact D (Example Authority)	Public: borough legal team	Contact	Medium	Check the published procurement route	Long horizon: 18 to 36 months
Fictional Contact E (Example Advice Centre)	Third: community advice centre	Contact	High	Offer support for a free advice clinic	Next month; mission first
[Name / organisation]	[Sector: type]	[Stage]	[Fit]	[Next action]	[Date and context]
[Name / organisation]	[Sector: type]	[Stage]	[Fit]	[Next action]	[Date and context]

STAGES

Aware	Contact	Building	Active
You know they exist	First conversation made	Regular, useful touchpoints	Agreed ongoing contact

Fit: High, Medium or Low, based on how closely their clients match your work.

MONTHLY TOTALS

Total sources	Private	Public	Third	New this month	Active with agreed preferences
[ ]	[ ]	[ ]	[ ]	[ ]	[ ]

THE RULE

Review weekly. A tracker is only useful if every row has a next action and a date.

INSIGHT

Specialise. A pipeline of twenty referrers who know exactly what you do is worth more than two hundred who do not.