

Team Summary Chart

Team Notes

Strengths

Areas to Improve

Training Plans

Goals (Short-Term)

Goals (Long-Term)

Use this template to help structure your real estate team and show members how they relate to each other. We've left space for you to note team strengths and areas to improve, choose your annual training plans and set goals.



Operations

Administrative Assistant

Operations Manager

Marketing Manager

Real Estate Agent (Check all that apply)

Name	Buyer's Agent	Listing Agent

Preferred Service Providers

Name	Company
Appraiser	
Attorney	
Escrow Officer	
Home Inspector	
Home Warranty/Insurance Company	
Mortgage Lender	
Photographer	
Stager	
Title Officer	
Transaction Coordinator	
Videographer	