

Real Estate Team Agreement Questionnaire

1. Team Vision & Culture

What is the mission and purpose of the team?

What values and standards are non-negotiable?

What type of culture are you creating?

What does success look like for a team member?

What kind of client experience should the team deliver?

2. What the Team Provides

What lead sources are provided?

How are leads distributed?

What training and coaching are included?

What marketing support is included?

What admin or transaction support is included?

What technology/software is provided?

What branding and marketing materials are included?

Are open house opportunities provided?

Are mentorship and accountability included?

3. Agent Expectations

Are there production standards? If so, what are they?

Are you providing leads? If so, what lead response times are expected?

What meetings or trainings are mandatory?

Are open houses required?

What CRM and follow-up standards must be maintained?

What communication standards are expected?

What availability standards are expected?

What compliance/documentation standards are required?

What activities can lead to termination or loss of leads?

4. Financial Structure

What are the commission splits?

How are team-generated vs. self-generated leads handled?

What fees are agents responsible for?

What expenses does the team cover?

Are there transaction fees or monthly fees?

How are pending commissions handled upon departure?

5. Lead & Database Ownership

Who owns team-generated leads?

Who owns database contacts added during the relationship?

Can agents take contacts when they leave?

What happens to active clients or pending deals if an agent leaves?

6. Separation & Exit Procedures

How much notice is required if either party ends the relationship?

What happens to active listings and buyers?

How are pending transactions handled?

How are marketing expenses or reimbursements handled?

What systems, branding, or materials must be returned?

Are there non-solicitation or confidentiality expectations?