

BUILDLINK ANALYTICS | FREE RESOURCE

Reporting Template Pack

A clean template pack for real estate and construction teams that need better reporting before they need more software.

BUILT FOR

Brokerages, operators, lenders, asset teams, general contractors, and construction operations teams.

USE CASE

Standardize recurring reporting, reduce manual rebuilding, and create cleaner operating visibility.

FORMAT

Use as a printable worksheet set or as the starting structure for spreadsheet and dashboard builds.

OVERVIEW

What this pack is for

Most teams do not need more tools first. They need cleaner reporting definitions, repeatable formats, and better internal consistency. This pack outlines the templates that usually create the biggest operating improvement with the least friction.

REAL ESTATE

CONSTRUCTION

PORTFOLIO REPORTING

PROJECT REPORTING

OPERATIONAL VISIBILITY

TEMPLATE 1

Opportunity qualification sheet

Use for buyer or seller intake, investment review, and early project screening.

Suggested fields	Opportunity name, contact, asset or project type, timeline, budget range, known constraints, readiness status.
Best for	Brokerages, agents, lenders, acquisition teams, and early preconstruction review.
Primary value	Prevents teams from chasing poorly defined opportunities with weak inputs.
Opportunity name	
Primary contact	
Asset or project type	
Timeline	
Budget range	
Known constraints	
Readiness status	

TEMPLATE 2

Property performance snapshot

Use for small portfolio review, owner reporting, and monthly asset visibility.

Suggested fields	Occupancy, leasing activity, revenue, operating expenses, variance notes, immediate issues.
Best for	Owners, operators, asset managers, and brokerages with recurring reporting obligations.
Primary value	Makes performance clearer without forcing teams into a larger software change first.
Occupancy	
Leasing activity	
Revenue	
Operating expenses	
Variance notes	
Immediate issues	

TEMPLATE 3

Project status report

Use for weekly construction updates, lender reporting, and internal coordination.

Suggested fields	Schedule status, budget status, change activity, open risks, pending decisions, next-week priorities.
Best for	General contractors, owner representatives, lenders, and project leadership teams.
Primary value	Keeps schedule, money, and decision bottlenecks visible in one format.
Schedule status	
Budget status	
Change activity	
Open risks	
Pending decisions	
Next-week priorities	

TEMPLATE 4

Budget variance tracker

Use for cost drift monitoring, draw preparation, and internal forecast review.

Suggested fields	Original budget, current forecast, actual spend, variance, cause of variance, corrective action.
Best for	Construction operations teams, project managers, controllers, and capital project stakeholders.
Primary value	Reduces lag between cost movement and management response.
Original budget	
Current forecast	
Actual spend	
Variance	
Cause of variance	
Corrective action	

TEMPLATE 5

Vendor and subcontractor tracker

Use for trade coordination, procurement visibility, and responsibility tracking.

Suggested fields	Vendor name, scope, status, key dates, open issues, owner.
Best for	General contractors, developers, owner teams, and operations managers coordinating multiple parties.
Primary value	Makes handoffs, timing, and ownership easier to manage across active work.
Vendor name	
Scope	
Status	
Key dates	
Open issues	
Owner	

HOW TO USE IT

What to do with this pack

STEP 1

Start with the template closest to the current pain point

Do not try to standardize everything at once. Choose the reporting format your team rebuilds most often.

STEP 2

Use the headings as fixed reporting definitions

Keep names and sections consistent so the same report means the same thing every time it is issued.

STEP 3

Move the stable version into a shared spreadsheet or dashboard

Once the reporting structure works on paper, convert it into the live operating system your team actually uses.

BUILDLINK NOTE

If your team rebuilds the same reports every week, the operating system is the problem.

BuildLink Analytics helps real estate and construction teams turn ad hoc reporting into a cleaner operating structure through analytics, automation, and intelligence integration.

BuildLink Analytics | Analytics, automation, and intelligence integration for real estate and construction.