COMPLETE AGENT DEVELOPMENT

TECH FOUNDATIONS 1

powered by: momentum + MAXTECH

THE PURPOSE OF THE MOMENTUM PROGRAM

As a RE/MAX Affiliate, you're a member of the most professional, most productive real estate network in the world.

There are many decisions you must make each and every day to run a successful business. The Momentum program provides basic information to help you. Please note: The Momentum program and materials are designed as a resource to reference. The suggestions made within are not mandatory.

FOR ILLUSTRATION ONLY

Certain sections of the Momentum materials illustrate how making changes to numbers, such as for costs and expenses, can financially impact an agent's business. These sections are meant to be illustrations only and are not intended to be an exhaustive list of costs that may impact your business or to be specific to your situation. RE/MAX, LLC makes no promises, representations or guarantees of any kind about the success or profitability of your operations.

CONFIDENTIAL

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TRADEMARKS AND REGULATIONS

In communicating your affiliation with RE/MAX in person, online or through promotional materials, please reference the RE/MAX Brand Identity: Trademark and Graphics Standards guide to ensure proper use of the RE/MAX name and marks.

TRUTHFUL ADVERTISING & COLD CALLING

The legal requirements for truthful advertising vary by state, province, region and country. Any advertising (including testimonials) and other communications involving the RE/MAX brand must comply with applicable laws and regulations and meet applicable ethical standards.

When cold calling, texting or emailing, please keep in mind that Telemarketing laws vary region by region and it is your responsibility to be aware of and comply with all state, province and federal telemarketing laws before picking up the phone.

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RE/MAX, LLC

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SUCCEEDING IN THE PROGRAM

Putting you on the pathway to Mastery

The Momentum program is created for high-minded, learning-based agents committed to self-mastery!

As you move through the program and take classes to help grow in different aspects of your business, use the tips below to make sure you're getting the most out of each boot camp.

GETTING THE MOST FROM THE PROGRAM

Before Class (Preparation)

- Successfully log into MAX/Center
- Compile at least 5-10 contacts
- Find a .jpeg or .png of a recent photo of yourself, no larger than five megabytes
- Have two screens if possible so you can work along while you watch the instructor
- Download the course workbook
- Enter the room or online course with an open mind
- Enter the room or online course expecting to walk out a better agent
- Arrive with an understanding of your weaknesses (as they relate to the topic)

During Class (Participation)

- Have your smart phone nearby when participating in live workshops
- Eliminate all distractions
- Focus intently
- Participate in any discussions
- Participate in any exercises
- Ask questions to improve your understanding

After Class (Implementation)

- Reread your workbook
- Study key ideas
- Put what you've learned into action
- Reinforce the ideas by coming back to review the material again and again

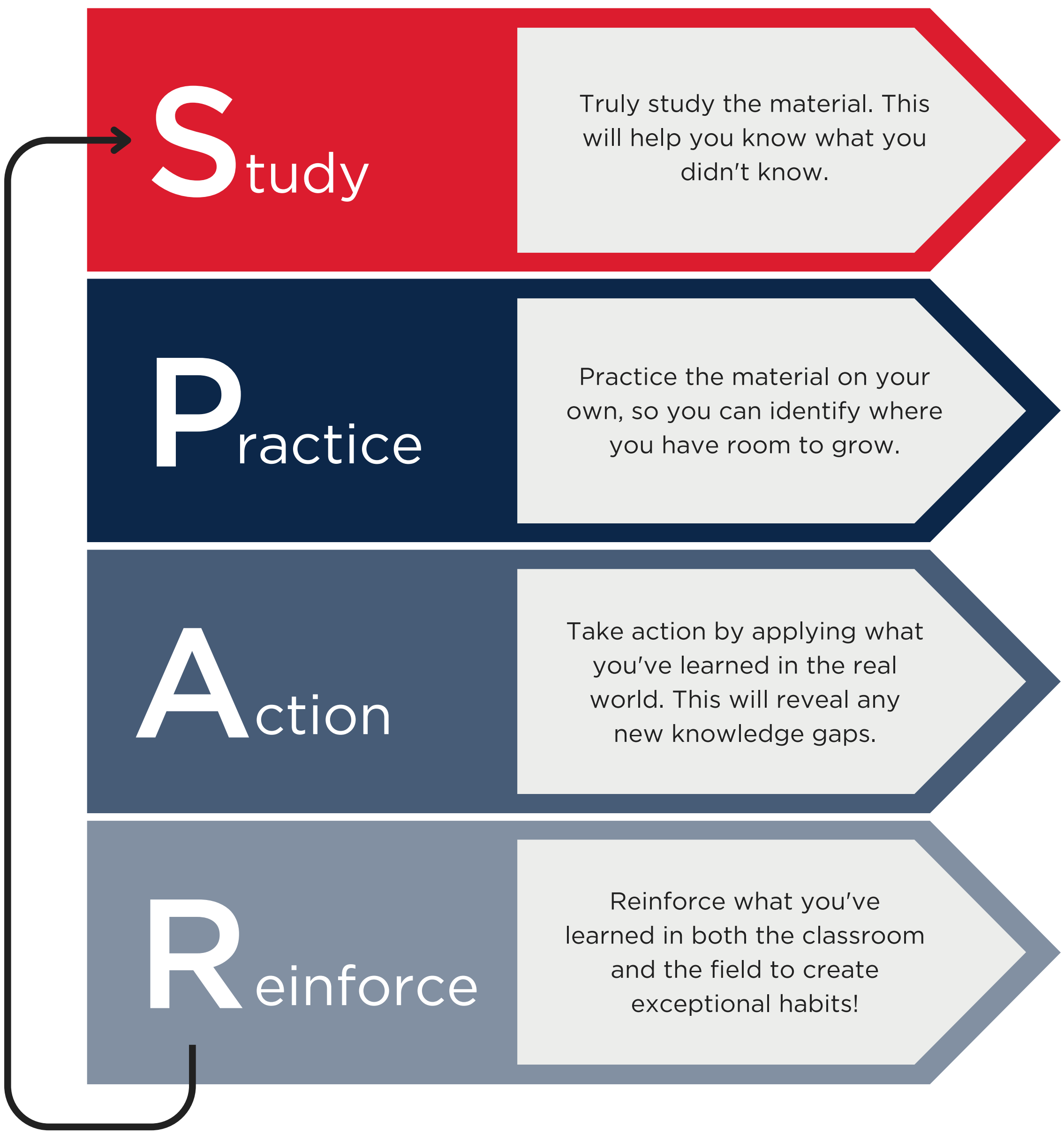
THE S.P.A.R. METHODOLOGY

Mastery is more about going "deep" than learning something new

True masters of their craft know how to S.P.A.R. — Study, Practice, Take Action and Reinforce habits by repeating the process and implementing any new information they've gained along the way.

By continuing to S.P.A.R. throughout this boot camp, as well as other Momentum lessons, and beyond, you can go even deeper with the content you are studying. Let's break it down:

S.P.A.R.



Tech Foundations 1

An Introduction to MAX/Tech
Crafting an Agent Profile
Navigating Your Smart CRM
Adding Contacts to Your Database

MAX/TECH OVERVIEW

Reviewing the solutions available to you

As a member of the RE/MAX network, you have access to several, state-of-the-art technology solutions to help you stay organized, market your business, capture and nurture new leads, including:

MAXCENTER®

MAX/Center is your starting point for accessing the solutions and resources RE/MAX has to offer! This is also home to your MAX/Profile, where critical information related to your online brand, MLS and service areas are configured.

Here, you can access your tech solutions such as MAX/Tech powered by BoldTrail, Photofy, RE/MAX Hustle as well as additional solutions like the RE/MAX URL Shortener, the RE/MAX Marketplace and the RE/MAX Referral Platform.

MAXTECH℠ powered by BoldTrail

MAX/Tech powered by BoldTrail is a robust platform offering award-winning marketing, lead generation and contact management solutions.

This is where you'll access your Smart CRM, customize your RE/MAX agent website, build informative listing and buyer presentations using Present, nurture your contacts through dynamic Smart Campaigns and so much more.

folio

Folio is your own email assistant! Available as a Chrome extension, Folio automatically creates Smart Folders in your Gmail or Outlook account when it detects a new deal. It also uses AI to detect important dates and creates a timeline that you can share with your clients to add additional value.

RE/MAX HUSTLE

Consumers love video! RE/MAX Hustle helps you quickly and easily create videos to market your brand and listings, connect with members of your community and personalize national advertising campaign commercials.

Photofy

Maximize your social media strategy with Photofy! Access a collection of branded graphics and templates to help promote your business and listings, connect with your audience and humanize your brand. This is a paid subscription, offering both a handy mobile app for posting on the go and robust desktop version where you can review in-depth analytics.

RE/MAX university

RE/MAX University is an incredible solution, full of educational opportunities to help you take any aspect of your business to the next level — from certifications and designations to on-demand training, live development sessions, coaching opportunities and so much more. The more you learn, the more you earn!

UPDATING YOUR MAX/PROFILE

Setting your tech solutions up for success

Your MAX/Profile feeds your professional details, contact information and photo to remax.com or remax.ca, the RE/MAX Referral Platform and MAX/Tech powered by BoldTrail solutions like your website, Smart Campaigns, email property alerts and more. Because your MAX/Profile may be the first impression someone has of your brand, be sure to put your best foot forward to help attract both potential leads and referrals from fellow agents alike.

Not sure how to access your MAX/Profile? Login to MAX/Center using your remax.net credentials and then click the profile icon in the top right corner of your MAX/Center homepage.

INFORMATION TO ADD TO YOUR MAX/PROFILE

☐ **1. Add Your Contact Information**

Your personal branding starts with the information about who you are and how to contact you. Make sure your phone numbers, email addresses and website links are correct so that potential customers and other agents can easily contact you.

☐ **2. Include a Photo**

In addition to selling property, RE/MAX agents are in charge of selling their personal brand. Adding a professional photo is a great way for consumer to put a face to your name! This photo will then appear in your MAX/Tech powered by BoldTrail Profile as well as other RE/MAX solutions.

☐ **3. Add Professional Details**

This section of your MAX/Profile allows you to showcase your industry expertise! Input your license information, the types of real estate you specialize in, any designations you've earned, your service areas, commercial activities and any previous affiliations that help make you stand out among the crowd.

☐ **4. Incorporate Personal Details**

Let consumers get to know the person behind your brand. Add your personal bio (find best practices for creating an agent bio on the next page), educational background, civic activities, hobbies and the languages you speak. All of this information can humanize your brand and help you connect with potential clients on a deeper level.

☐ **5. Link Your Business Social Media Accounts**

Help potential clients reach you on social media by including links to your business Facebook, X (Twitter), LinkedIn, Instagram, YouTube and other social accounts. These links will appear on your remax.com/remax.ca agent bio page, encouraging visitors to follow you online.

WRITING AN ENGAGING AGENT BIO

Creating the perfect first impression

Your agent bio may be the first impression you make on potential clients! Use the exercise below to help draft the perfect bio. As you write, consider leaning on separate AI tools for extra support. However, don't forget to review and put any content created by AI into your own words before sharing.

3 THINGS TO INCLUDE IN YOUR AGENT BIO

Writing a compelling agent bio is as simple as asking yourself three questions. Read through them and use the lines below to write your own answers!

1. Why are you in real estate? (Adding a personal touch)

Everyone has their own unique stories. What's yours? Are you a military veteran who has found their calling, a family-oriented agent, a member of a local sports league? Whatever your personal interests or story may be, use that to connect with clients through your bio and find a common interest to get to know them beyond a surface-level transaction.

Answer: ____

____

____

2. What do you specialize in? (Positioning yourself in a saturated market)

What makes you stand out among the crowd? Maybe you specialize in a specific type of real estate, such as first-time home buyers, equestrian properties or luxury homes. This is your opportunity to position yourself as an expert.

Answer: ____

____

____

3. What are your qualifications? (Establishing authority)

Describing yourself as a go-getter and dependable agent will draw in potential clients, but showing tangible results will seal the deal. Emphasize what you bring to the table and include information on your educational and training background. Incorporate statistics, client testimonials and ratings. This demonstrates your ability to follow through on what you're offering!

Answer: ____

____

____

Within your MAX/Tech powered by BoldTrail profile, you can update your email signature. This signature will appear at the end of any email you send within MAX/Tech powered by BoldTrail.

While it may feel small or insignificant, your email signature is more than just a sign-off, it's a way to add credibility to your emails while also promoting your brand and contact information. Let's go over a few things you can do to create a more memorable email signature.

5 THINGS TO ADD TO YOUR EMAIL SIGNATURE

1. Your Name
The first thing in your email signature should be, of course, your name! This is also a great place to add any of your titles or designations that you want people to associate with your name.

2. Your Contact Information
Current federal laws state that your email signature should include your brokerage's mailing address and **your state or province may have other requirements**. However, as a best practice, you should also be sure to include your phone number to make it easy for your contacts to reach you.

3. Your MLS ID/CREA
If you are an Canadian affiliate, you must include your MLS ID/CREA in your signature.

4. A Link to Your Website
Don't pass up an opportunity to drive leads to your website! Include a link to your remax.com/remax.ca agent website so your contacts can easily learn more about you, your listings and everything you have to offer.

5. Links to Your Business Social Media Accounts
Help potential clients reach you on social media by including links to a couple of your business Facebook, Twitter, LinkedIn, Instagram, YouTube or other social accounts.

Example email signature:

Angie Agent, REALTOR®
RE/MAX Awesome | 5075 Syracuse St, Denver, CO 80947
Cell: (555) 555-5555 | Office: (444) 444-4444

AngieAgent.remax.com
Facebook | Instagram | YouTube

DAILY CALL LIST BEST PRACTICES

Setting up + leveraging your daily call list

Consistent communication is key when it comes to staying connected with your contacts! Your MAX/Tech powered by BoldTrail Daily Call List will pull together a handful of contacts from your Smart CRM for you to contact every weekday, keeping you on-track and top-of-mind. Use the tips below to successfully set-up your Daily Call List.

Note: To set-up your Daily Call List, visit your MAX/Tech powered by BoldTrail profile and edit the "Daily Call Task Creation" section.

1. Turn on 'Auto Create Call Tasks Each Day'

This will prompt the platform to create your daily call list automatically each week day. You also have the option to create call tasks on weekends, if you choose.

2. Update the Statuses to Generate Call Tasks for

It is recommended that you choose the 'Sphere,' 'Client,' 'Contract' and 'Closed' contact statuses to make the biggest impact. This will tell the platform to create call tasks for those types of contacts only.

3. Choose the Number of Call Tasks to Create

While you can tell the platform to create as many calls as you'd like per day, it is recommended that you set it to six calls. That means, if you spend five minutes on each call that is 30 minutes per day, 30 contacts per week and 120 contacts per month!

4. Set the 'Time to Send Email'

MAX/Tech powered by BoldTrail will send you an email with your Daily Call List everyday at your set time. Try to choose a time when you have the most energy and can create a consistent habit!

MAX/TECH POWERED BY BOLDTRAIL SOLUTIONS

Reviewing what is available within MAX/Tech powered by BoldTrail

On the left hand side of your MAX/Tech powered by BoldTrail dashboard, you'll find the navigation menu. You can use this to navigate to any part of the platform at anytime. Let's break it down:

Dashboard	This button will take you back to your platform dashboard, no matter where you are in the platform.
Contacts	Your CRM! The central hub for managing contacts and staying connected.
Listings	Manage your listings: review lead activity, add additional details and photos, find potential buyers already in your database, and more.
Deals	Sync with one of the three transactional platforms available to keep track of your past transactions
Web & IDX	View and customize your RE/MAX Agent Website! Highlight your brand, listings and local communities to capture new leads.
Marketing	Access everything you need to successfully market your business, promote your listings and stay top-of-mind with your contacts.
Lead Engine	Review and leverage multi-channel lead generation solutions to capture prospective buyers and sellers all across the web.
Vitals	Review important analytics regarding your contacts, lead generation activities, website and lead engagement.
Marketplace	Purchase additional features to add to your MAX/Tech powered by BoldTrail account.
More	Need help? Access support resources like RE/MAX University, Inside Real Estate's training calendar or Playbooks to spark inspiration.

HOW CONTACTS GET INTO YOUR CRM

Building your database

Your MAX/Tech powered by BoldTrail Smart CRM gives you the solutions you need to stay organized and connected. But before you can begin using this powerful feature, you need to add your contacts!

There are a few ways you can do this, so let's review a few of the options:

3 WAYS CONTACTS CAN BE ADDED TO AGENTS' SMART CRM

1. Digital Sources

Any leads that are assigned to you from remax.com or remax.ca, your office or team website as well as your own website will be added to your Smart CRM as new contacts.

2. Agent Additions

You can also choose to add contacts individually one by one or to bulk upload contacts using a .CSV file. This file can be found on help.insiderealestate.com.

Let Inside Real Estate do the work for you by utilizing their free lead import service. You can access this service by visiting the Lead Engine page of your MAX/Tech powered by BoldTrail platform and clicking on 'Bulk Import.' From there, you'll be prompted to fill out a Lead Import Request Form to get the process started.

3. Outside Sources

You can also choose to connect your Gmail or Outlook accounts or a lead dropbox and automatically pull those important contacts into your MAX/Tech powered by BoldTrail database! This option gives you the opportunity to sync your calendar, tasks, email and contacts straight from your email to your Smart CRM.

It is your responsibility to be aware of and comply with all state, Province and national telemarketing, texting and email marketing related laws. For more information, please see page 24 of this workbook.

IMPORTANT MARKETING NOTICE

Please keep in mind...

Both the Canadian and United States federal governments sets rules and regulations pertaining to telemarketing (including texting), but provincial and/or state legislation can also apply.

In the United States, marketing emails and other commercial electronic messages are also subject to Federal law (CAN-SPAM); in Canada, they are subject to Canada's Anti-Spam Law (CASL). It is the caller's/texter's/emailer's responsibility to be aware of and comply with all Canadian and United States federal and state/provincial telemarketing, texting, and email related laws.

Caller/texter/emailer/user of product is responsible for obtaining any required prior written consent for commercial calls/texts/emails as well as for including appropriate opt-out mechanisms or "STOP" functionality that may be required by federal, state and/or provincial law.

BUILDING A DATABASE

Potential contact sources to fuel your database

You've heard it a million times: real estate is a relationship business. Your MAX/Tech powered by BoldTrail Smart CRM can do incredible things, but all of that means nothing if you don't have contacts to add.

TAKE ACTION

Take some time to review the list of potential contact sources below. If necessary, time block your calendar to go really in-depth with this list, visiting each source as you go and adding any contact information you find to your Smart CRM. Keep in mind that the contact information may be out of date, but this offers a great opportunity to reach out and start up a conversation once again!

- [ ] Social media websites (such as Facebook, Instagram, LinkedIn or Twitter)
- [ ] Your current cell phone
- [ ] Any past cell phones you still own
- [ ] Rolodexes
- [ ] Old address books
- [ ] Email contacts
- [ ] Filing cabinets + past client files
- [ ] Your neighborhood directory
- [ ] ______________________________
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BUILDING A DATABASE
Continued

Now that you have any existing contacts added to your Smart CRM, it's time to start thinking outside the box. You know a lot of people and have a sphere of influence, even if you don't know it!

TAKE ACTION

Below, you'll find a list of questions to consider to help flesh out your database. Write your answer down on each corresponding line. You may not have answers for all these questions, but these are a great starting point.

Once finished, add your new list of contacts to your database using whatever contact information you may have for them. Again, this is a great opportunity to reach out to connect to confirm their phone number or email and get the conversation started.

Do you have any neighbors? Who are they?

Do you have any past neighbors? Who are they?

Who are your past colleagues?

What about your partner's friends and colleagues?

Do you have any high school or college friends? Who?

Do you have any past colleagues? Who?

Who is your child's teacher?

Who is your child's coach?

BUILDING A DATABASE
Continued

Are you a part of any organizations? Is anyone else involved?

Who is your hair stylist or barber?

Who is your nail technician?

Who is your esthetician?

Who is your tattoo artist?

Who is your car technician?

Who is your plumber?

Who is your family doctor?

Who is your mail person?

Who is your financial planner?

Who is your accountant?

Who do you go to church with?

Who is your landscaper?

Who goes to your gym?

Who walks your dog?

Who grooms your dog or cat?

Who is your veterinarian?

Who are your parents' friends?

Who are your best friend's parents or extended family?

Who are your child's friends' parents?

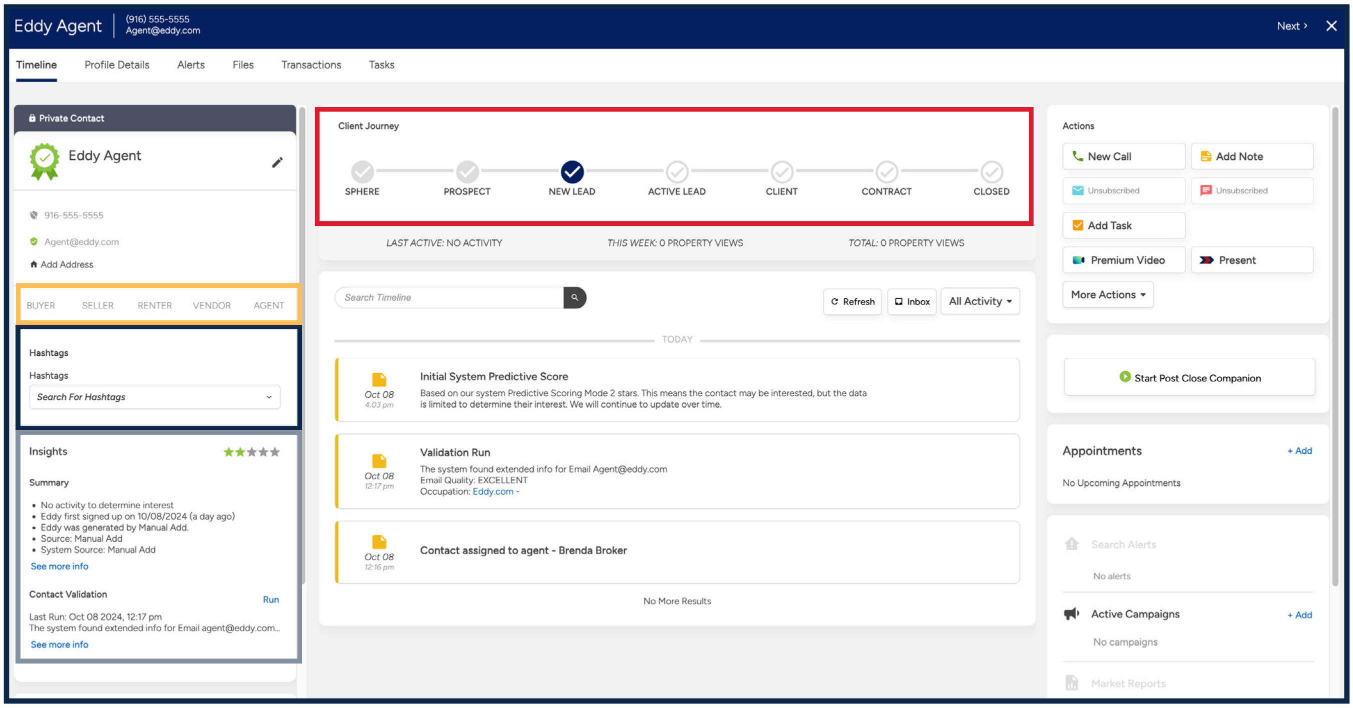
Do you know any local business owners? Who?

Who have you done business with in the past?

KEY LABELS YOU NEED TO KNOW

Organize, filter + trigger actions in your Smart CRM

MAX/Tech powered by BoldTrail can help you automate different parts of your business. There are four things within a Contact Record that can trigger automations:



1. Contact Status

A contact's status indicates where they currently are in the Client Journey, from Sphere to Active Lead to Closed and everything in between.

2. Lead Type

Lead types refer to the type of contact you are working with, regardless of where they are in the buying or selling process. Choose from Buyer, Seller, Renter, Vendor or Agent to better organize your database.

3. Hashtag

Hashtags are labels that you can add to your contacts to better organize and segment your database. Later in this workbook, you'll find some examples on hashtags to add to your contacts.

4. Lead Source

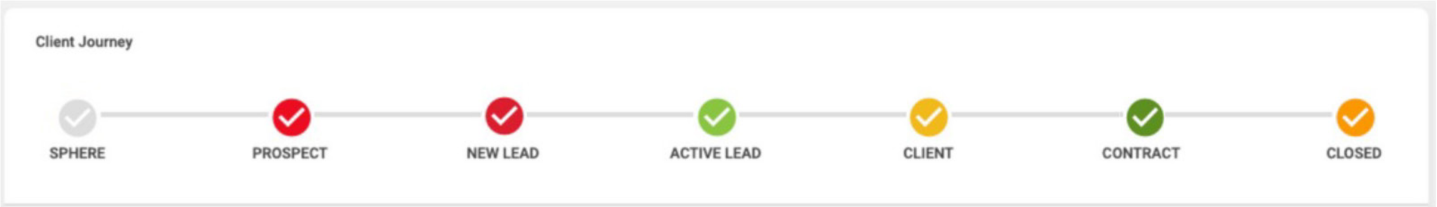
The lead source, which you can find listed under the "Insights" section of the Contact Record, will tell you where this contact came from! If you added a contact manually, this section will say "Manual Add."

KEY STATUSES YOU NEED TO KNOW

Help agents define and assign statuses at the right time in the client journey

Understanding a client's journey is not only an important factor in your lead generation and conversion process; it's also a critical component of your repeat and referral strategy too.

Make sure you assign the right status at the right time in the client journey to ensure you're providing exceptional service and continued value. Below are the different contact statuses available within MAX/Tech powered by BoldTrail.



Sphere
Good for friends, family or connections who could refer or do business with you in the future.

Prospect
A consumer who indicated they are active in real estate, but likely 6+ months from making a move.

New Lead
A consumer who has not yet been communicated with and someone whose needs are undefined.

Active Lead
A consumer whose needs are defined and is 3-6 months from making a move.

Client
A consumer who agreed to work with you as their agent, or is less than 3 months from making a move.

Contract
A clients who signed an agreement of sale to buy or sell a property.

Closed
A client who closed on their real estate transaction and needs long-term follow up.

HASHTAG EXAMPLES

Ideas for effectively labeling your contacts

Hashtags are what can truly take your MAX/Tech powered by BoldTrail database to the next level! These handy tags allow you to organize your contacts, set the stage for helpful automations and build a more targeted communication strategy. Below, you'll find ideas for hashtags that will help revolutionize your database.

LOCAL AREAS

Make a list of the areas in your community where you do the most business or would like to expand your business. Then, add each of these neighborhoods as hashtags within MAX/Tech powered by BoldTrail. For example: #WillowCreek or #LowerHighlands.

SEARCH PREFERENCES

For buyers, add their home preferences as hashtags! This will allow you to easily filter your database down by specific features like #Pool, #LargeBackyard or #ChefsKitchen and send more targeted messages to buyers in your database.

URGENCY LEVEL

How eager is the prospect to sell or buy a home? By organizing your database by urgency level, using hashtags like #HotBuyer, you'll be able to better prioritize your outreach.

INTERESTS + HOBBIES

While most agents focus on sending real estate and home-related content, take your outreach a step further by taking an interest in your contacts' interests! Create hashtags for common hobbies and interests like #Golf, #Pottery or #Reading.

GROUPS + ASSOCIATIONS

Is your contact a member of any groups or associations? This could be another great opportunity to send them unique content based on their interests. These could include #BookClub, #PTO, #BowlingLeague or #FoodBank.

CAMPAIGN SPECIFIC

Have you created a Smart Campaign that is triggered by a specific hashtag? Add it to your contacts to enroll them in that campaign.

YOUR NEXT STEPS

Keeping up the momentum after completing Tech Foundations 1

Congratulations on completing the first module of the Tech Foundations Boot Camp! You've taken a monumental first steps to better understand how you can leverage the technology available to you.

Keep the momentum going by spending a few minutes each day using your technology. Just like learning a language, you need practice so you become more comfortable in using these solutions to support your business growth. Not sure where to start? Here are three next steps to help you build daily habits with your solutions:

- ☐ 1. Time block a few minutes each day to become familiar with solutions that can help build your business.
- ☐ 2. Create a hashtag strategy to organize your contacts into groups so you can communicate effectively and provide value.
- ☐ 3. Get everyone you know into your Smart CRM and start updating their status, type and adding hashtags.

Tech Foundations 2

Behavioral Automation
Default Smart Campaigns
Search Alerts + Market Reports
Website Set-up
Promoting Your Brand

UNDERSTANDING BEHAVIORAL AUTOMATION

Things to know about the Behavioral Automation feature

As you know, consistent communication is key to converting new leads and staying top-of-mind with past clients. However, while reaching out with a phone call or personalized email is a great touch every now and then, with MAX/Tech powered by BoldTrail, you're able to lean on automation to help you stay connected.

Behavioral Automation provides real-time outreach, automatically sending out communications to contacts that perform "hot" behaviors on your website. Let's take a moment to review this solution and highlight a few things you should know:

4 THINGS TO KNOW ABOUT BEHAVIORAL AUTOMATION

1. Behavioral Automation is Already Turned-on

Contacts with statuses of New Leads, Active Leads, Prospects and Sphere are automatically included in Behavioral Automation the moment you first log into the platform. You are able to edit these statuses however you'd like, but it is recommended that you turn on all of the statuses to make the biggest impact!

2. Behavioral Automation Sends Communications After Specific Lead Actions

The Behavioral Automation solution will prompt the platform to send an email and text to the lead if they perform one of these behaviors:

- A contact re-visits your website after 14 days
- A contact visits your website 5 times in a 7 day period
- A contact views 5 properties within 24 hours
- A contact views 10 properties within a 7 day period
- A contact views a specific property 3 times
- A contact favorites a property

3. The Platform will Automatically Update a Contact's Status

If an existing contact texts, emails or calls you or if you've successfully tracked an outbound call in an existing Contact Record, the platform will automatically move those contacts into the "Active" status.

4. You Can Customize the Set Emails and Text Messages

Within the Behavioral Automation page, you can review the pre-set messages that will be sent to your contacts who perform those "hot" behaviors on your website. If you'd like to make a change, click 'Edit' next to the message. As a best practice, it is recommended that you edit each message to add your last name as it isn't automatically included.

MARKET REPORTS + SEARCH ALERTS

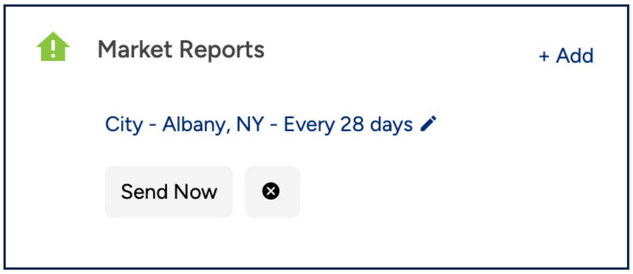
Best practices for setting different automations with your contacts

Inside of a Contact Record, you'll notice a few different options on the right side of the screen. Here, you can create a variety of materials for your contacts like Present presentations and Listing Valuations and even set automations like Smart Campaigns, Market Reports and Search Alerts.

Market Reports and Search Alerts are an extra resource you can provide your contacts on a regular basis to provide value, aid in a home search or keep them informed on the local real estate market. Let's break these automations down and explore some best practices for utilizing them in your business plan:

Market Reports

This automation includes a visual summary of statistics like the number of new listings, price reductions, average list price and more from a specific area based on your local MLS feed.



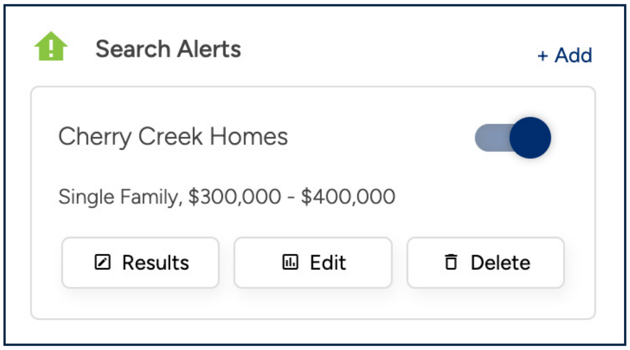
Use this feature to stay in-flow with your current seller clients; stay top-of-mind with past clients; and provide additional value to your current buyers clients.

Market Reports Best Practice:

- Set your Market Report to send every 28 days. If you set it any earlier, the information may not change significantly enough to actually provide any value.

Search Alerts

The Search Alerts feature is an automated email sent from MAX/Tech powered by BoldTrail to your contact that contains a list of properties they might be interested in.



Use this feature to keep your current buyer clients informed and let them know of new properties that hit the market as quickly as possible.

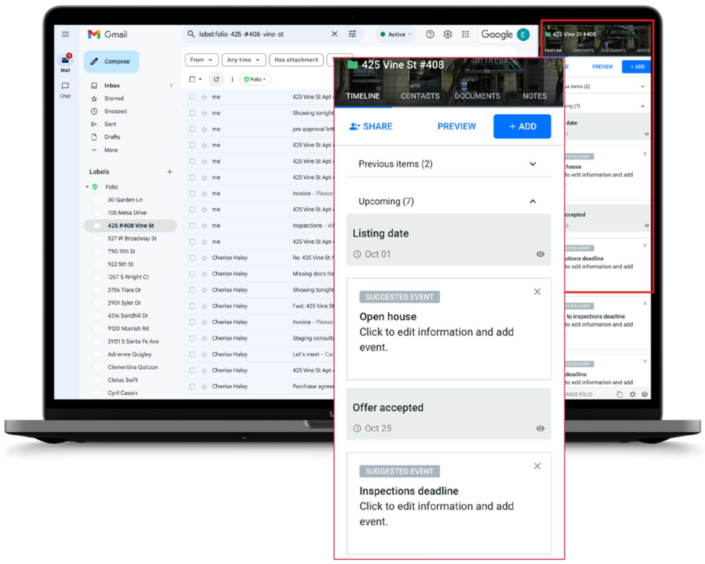
Searh Alerts Best Practices:

- Set your Search Alert to have a 'Dynamic Subject Line' which will change based on the properties it sends.
- You should also be sure to set the send date as 'ASAP' or 'Daily' so they receive information about new properties as soon as possible.
- Finally, as you set up your Search Alert and choose what criteria should be considered, be as broad as possible in order to include any and all listings that may spark interest.

ADDING VALUE WITH FOLIO

An AI assistant that lives in your email account

In today's fast-paced real estate market, agents need every tool at their disposal to add value during transactions. With clients expecting clear communication, seamless organization and timely updates, staying on top of multiple deals can quickly become overwhelming! That's where Folio comes in, helping you streamline your workflow, stay organized and provide the high level of service that clients appreciate.



Folio is an automated assistant that organizes transaction emails in real time. It integrates with your Gmail or Outlook account seamlessly, creating smart folders to keep transaction details organized and generating a sharable timeline to create transparency with clients.

With Folio, you can ensure everyone stays connected — aware of important milestones, deadlines and next steps — adding a ton of value to the transaction.

HOW TO GET STARTED WITH FOLIO

You will receive an email invitation and sign-up link from Inside Real Estate to begin setting up your Folio account. This email will come from folio@amitree.com.

Once you have signed-up for Folio, you will need to download the Folio Chrome extension to ensure you are making full use of the experience!

SETTING YOURSELF UP FOR SUCCESS WITH FOLIO

Set yourself up for success in just five steps:

- [ ] Create timeline templates to save time in the future.
- [ ] Add local resources and trusted vendors that clients can lean on.
- [ ] Add local service providers and utilities for clients to reference.
- [ ] Connect cloud storage for seamless document sharing.
- [ ] Verify your profile information.

DAY 1 OF YOUR RE/MAX AGENT WEBSITE

A checklist to help you get started with your new website

Nine out of ten customers rely on the internet as one of their primary sources during their home search — which means having a robust web presence is a must! Luckily, with MAX/Tech powered by BoldTrail, you automatically have a stunning website right out-of-the-box.

However, while your website is ready for you on day one, there are a still things you should do to better customize your website to your unique business.

DAY 1 WEBSITE CHECKLIST

- [ ] **1. Choose Your Layout (Theme)**
  Your website will automatically have a RE/MAX-branded layout, or 'Theme,' that you can utilize right from the get-go. However, there are several other options for you to choose from, including a luxury-specific template among others that will highlight different geographic areas that you want to target in your marketing. Choose the layout that works best for your business!

- [ ] **2. Select Your Main Image**
  Regardless of the layout you choose, you will be able to add a custom header image that will be the main focal point of your website's home page. Upload a photo that says something about your business. This could be a collage of past listings, a picture of a location in your community or your team if you are a team member. No matter which you decide on, make sure you have permission to use your photo. Use a photo that is 1600x650 pixels for the best results.

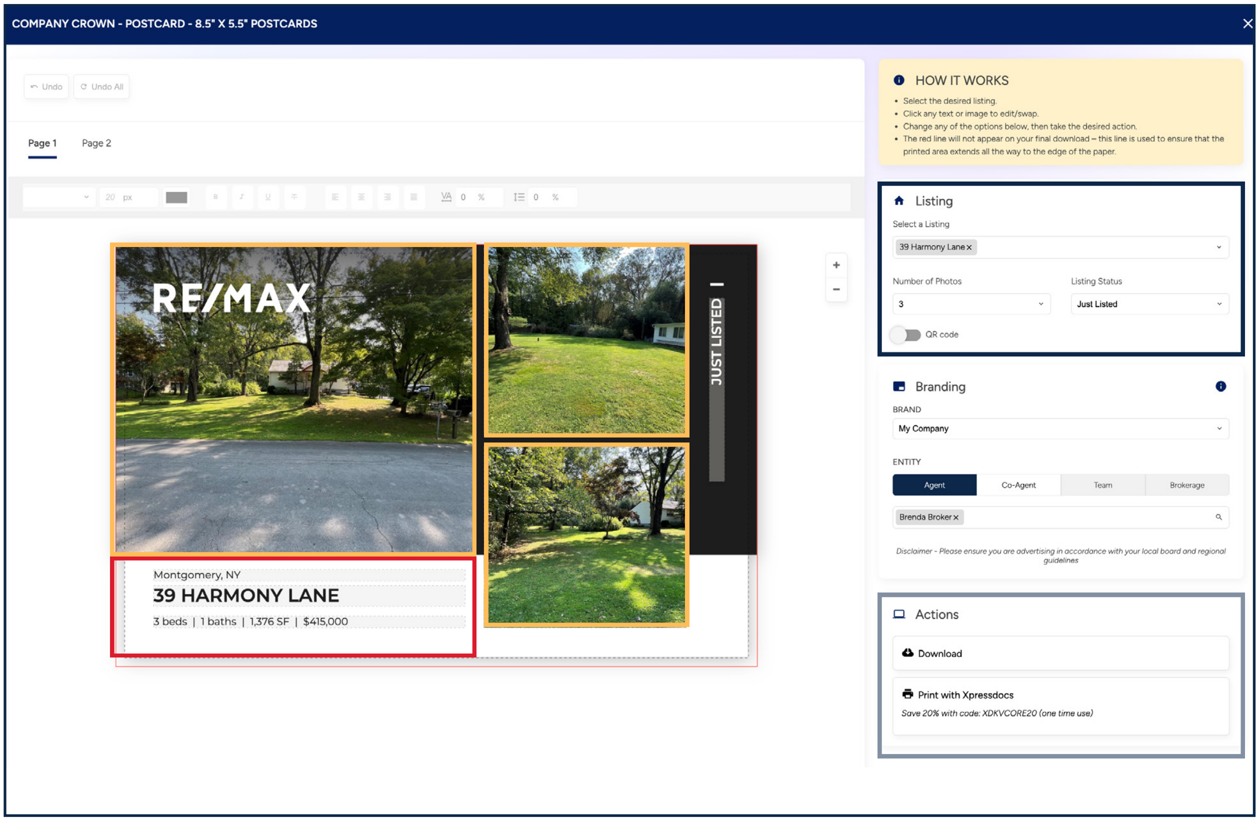
- [ ] **3. Select Your Service Areas**
  Your MAX/Tech powered by BoldTrail platform will automatically create service area pages for communities within your MLS — all you have to do is choose which ones you want included on your website! To update these, visit your website settings page and then click on 'Service Areas and SEO' to add communities.

- [ ] **4. Add Client Testimonials**
  As an agent, reviews are one of the most valuable solutions you can use to market your business and build trust with potential clients. With MAX/Tech powered by BoldTrail, you can manually add testimonials to your website or sync your Zillow or Testimonial Tree reviews. To update these, visit your website settings page and then click on 'Testimonials.'

- [ ] **5. Review Additional Customization Options**
  While the above tasks are the basic things you can (and should) do to customize your website, there are so many more settings you have access to! Add new pages to your website like buyer or seller pages; start your own blog; update your website menu; embed different widgets; customize how listings appear and much, much more.

Whether you're looking to advertise your business or promote your listings, DesignCenter within MAX/Tech powered by BoldTrail has a ton of eye-catching templates you can customize in just a few clicks.

However, you should keep these things in mind as you edit your template so you can be sure to really make your creation completely your own:



1. Template Text + Logos
While each template will come with pre-added text, make sure you review and update the text if necessary to add additional information. You can also add your own logo to brand it to your unique business.

2. Add Additional Photos
When customizing a template, you'll be able to select one of your listings. The system will automatically pull in listing information and photos to fill-out the template. If you'd like to add additional photos you can do so here and swap them out as needed!

3. Update Listing Information
Add your listing information, choose the number of photos to include and add the listing status. You can also choose to add a QR code to a specific page on your website (like a listing details page) to guide recipients to the right place for more information.

4. Share Your Creation
Share your creation directly to social media, download it or send it via email or text!

PROMOTE YOUR BRAND WITH CUSTOM GRAPHICS

Using Photofy to connect with your audience

Whether you are looking to level up your social media marketing or want to add a visual to a client email, Photofy has you covered! This handy solution, which is available to you for a minimal monthly fee, offers a wide variety of RE/MAX-branded photo, graphic and video templates that you can customize to better fit your brand and message.

Once you've created your Photofy account, here are a few ways to lean on the mobile app or the desktop version to support your business goals:

5 IDEAS FOR LEVERAGING PHOTOFY

1. Highlight the RE/MAX Value Proposition

As a RE/MAX agent, you are a part of a trusted brand with a long history of supporting home buyers and sellers all over the globe! Showcase your status as a member of the RE/MAX family online by sharing a pre-made graphic from Photofy. You can access these templates within the 'RE/MAX Brand' section of the platform.

2. Promote Your Listings

Lean on Photofy to help you promote your new listings, upcoming open houses, recently sold properties and more! The 'House Listings' section is full of templates you can edit in just a few clicks. Add your own listing photos and information and then post the graphic directly to social media to capture your audience.

3. Celebrate a Holiday

Spread cheer with timely graphics that celebrate an upcoming holiday. Choose from templates that highlight national holidays like New Year's, Memorial Day and Canada Day or more unique holidays like National Hot Air Balloon Day and St. Patrick's Day! You can access these templates within the 'Holidays/Celebrations' section.

4. Send a Contact a Well-wishes on Their Birthday or Home Anniversary

Make a personal connection with one of your contacts by sending them a personalized graphic and message on their birthday or home anniversary date! This is a great way to add a personal touch to your outreach while still staying top-of-mind. You can access Photofy's birthday and home anniversary templates in the 'Holidays/ Celebrations' section.

5. Showcase Your Real Estate Knowledge

Position yourself as a real estate consultant by sharing your expertise in the real estate market online! The 'Infographics' tab within the 'RE/MAX Brand' section of the platform has a wide range of templates to inform your audience about the real estate process, homeowner tips, your local real estate market and more.

PROMOTE YOUR BRAND WITH CUSTOM VIDEOS

Using RE/MAX Hustle to connect with your audience

In today's digital age, video is the #1 way to connect with people online! By sharing video content on social media, adding it to your website or sending it directly to a contact, you are more likely to capture your audience's attention and get your message across.

However, we know that video creation is usually easier said than done. That's why RE/MAX Hustle, a free video editing software available to you, is one of the best solutions in your agent arsenal, featuring a wide range of ready-made video templates and a simple editor you can use to create custom videos.

4 IDEAS FOR LEVERAGING RE/MAX HUSTLE

1. Highlight Your Value

You are a RE/MAX agent — you've got the hustle, the experience and the know-how. Now, you just need to showcase it! Use the 'Highlight Your Skills' template inside RE/MAX Hustle to create a video that outlines who you are and everything you have to offer.

2. Create a Community Message

Has your community been through something tough recently? Share a personalized message of support to let them know you're there for them with the 'Create a Community Message' template.

3. Customize a National Commercial

Take advantage of the content RE/MAX HQ has already created for you by adding your own information to a national RE/MAX advertising campaign! You can do this inside the 'Customize a Commercial' template, with new commercial options being added all the time.

4. Create Your Own Video

Don't see a video template that fits your exact need? The Hustle Video Editor is a simple solution that is more straight-forward than a traditional video editing software, focusing on just your video clips and photos, stickers and music!

Use this solution to take your marketing to the next level by creating local market updates, more in-depth property tours, "About Me" videos and so much more.

SCHEDULING A MASS EMAIL

Connecting with your sphere

Mass emails are a great way to connect with a group of contacts in your Smart CRM. Whether you're inviting clients to an event, sharing homeowner tips, or announcing a new listing, this simple feature in MAX/Tech powered by BoldTrail has you covered. Let's go over how to filter your contacts you want to send the email to, how to create the email and schedule it, and how to track its status.

1. Selecting Your Contacts

Once you have in mind the type of email you want to send, you can choose your recipients by navigating to the 'Scheduled Mass Emails' tile in your 'Marketing' tab. Choose your filters, hashtags or contact status to ensure your email is going to the right people.

2. Creating Your Email Contents and Scheduling

Once you are in your email and building it out, keep in mind you can always search for a pre-built template if you don't want to write from scratch. Whenever you're finished with the email content, choose the date and time you want to send, and click 'Schedule.'

3. Tracking the Status of Your Scheduled Email

When the time comes for your email to go out, you can track the status in the list of scheduled emails. A green check mark confirms your email has been sent out, a red "x" means it has not been sent, and "queued" means it is in line to be sent. Keep in mind that to avoid being flagged as "spam" in your recipients' inbox, the email will be sent out in batches.

IDEAS FOR EMAILS TO SEND TO YOUR SPHERE

With Mass Emails, you can send valuable information to your contacts that is geared towards their unique interests! Here are a few ideas to help get you started:

New Listings

Let both current and past buyers know of properties available that they might be interested in.

Open Houses

Invite your sphere to your upcoming open houses! Connect with potential buyers and start a conversation on the local market.

Community Events

Let your contacts know about upcoming holiday gatherings, local sports games or charity functions, establishing yourself as a pillar in the community.

Homeowner Tips

Show off your expertise by sharing some advice for homeowners, from cleaning tips to monthly maintenance checklists.

PROMOTING YOUR AFFILIATION WITH RE/MAX

Fostering potential business through strategic communication

Once you have your contacts in your database, it's time to begin fostering potential business through strategic communication. But before you dive right in, it's a good idea to first announce your career as a RE/MAX agent! This will allow you to, one, let your contacts know about your career and, two, give them an opportunity to reach out to you for any of their real estate-related needs.

CRAFTING AN ANNOUNCEMENT MESSAGE

You've chosen the powerful brand that is RE/MAX and now it's time to really tap into and leverage that brand name with your sphere! Craft an announcement message to let your contacts know what you do and how you can help them. As you write your message, keep these questions in mind:

1. How can you leverage RE/MAX's benefits to increase your services as an agent?

2. How can you, as a real estate agent, benefit others? Are there problems that need solving?

3. What is a call-to-action that you can add to receive engagement, follow-up or referrals?

Here's an example to help you get started:

"Hey ____________! I hope you are having a great 2024 so far. I wanted to let you know that I've made an exciting career change. I am now an actively licensed real estate agent here in ________________.

I decided to become a real estate agent to provide for those who can feel overwhelmed by the complicated aspects of real estate. I want to help take some of the stress out of buying or selling a home and reignite the joy that can come from achieving your real estate dreams!

To ensure I am able to offer the absolute best service to my clients, I've joined RE/MAX, the most recognizable name in real estate! And I've found my way to RE/MAX __________, where I am equipped with the some of the best tech solutions and resources in the business.

If there is ever any way that I can be of assistance to you or someone you know, please don't hesitate to call or text me at _____________! I look forward to connecting with you soon."

STAYING TOP-OF-MIND WITH RE/MAX
Keeping the conversation going

If you have already told members of your database about your career and affiliation with RE/MAX, no worries! Use the information below to craft a message dedicated to staying top-of-mind with your database and building long-lasting relationships.

CRAFTING A SECOND MESSAGE

As you write your message, continue to keep these questions in mind:

1. How can you leverage RE/MAX's benefits to increase your services as an agent?

2. How can you, as a real estate agent, benefit others? Are there problems that need solving?

3. What is a call-to-action that you can add to receive engagement, follow-up or referrals?

Here's an example to help you get started:

"Hey ____________! As you may already know, I recently made the decision to start my career in real estate and am now a licensed real estate agent at RE/MAX ____________.

Joining such a powerful brand that elevates the successes of my clients was an obvious choice for me. I cannot wait to help the different people in my life achieve their real estate goals without being overwhelmed.

I understand that buying or selling a home can be a complicated process. That's why it is so important to have a RE/MAX agent by your side!

To help my potential buyers, I want to make sure I have access to all of the available homes in the area. Would you happen to know anyone who is selling or thinking about selling in the near future? I would appreciate any insights!

Additionally, if there is ever any way that I can be of assistance to you or someone you know, please don't hesitate to call or text me at __________! I look forward to connecting with you soon."

YOUR NEXT STEPS

Keeping up the momentum after completing Tech Foundations 2

Congratulations on completing the second module of the Tech Foundations Boot Camp! During this module, you learned how to effectively communicate with your contacts and promote your business with your MAX/Tech solutions. However, practice makes perfect.

Make sure you are continuing to spend at least a few minutes each day interacting with your solutions and building consistent habits. Curious where you should begin? Follow these four next steps to continue your momentum forward:

- [ ] 1. Continue to work within your Smart CRM to update and manage your contacts' information (try to review and update six every weekday.)
- [ ] 2. Review all of the default communications (Smart Campaigns + Behavioral Alerts) and develop a plan for personalizing them.
- [ ] 3. Provide value to your leads and contacts by setting up personalized Search Alerts and Market Reports (try to set up two every weekday.)
- [ ] 4. Develop a content strategy for your agent website (define your value proposition) — use example on the following page to get started!

WEBSITE CONTENT STRATEGY EXAMPLE

Creating a content strategy for your RE/MAX agent website

TAKE ACTION

Your website is your digital homebase. This is where most people will go to learn more about you, your listings and your services. Make sure you are leaving a good impression on your website visitors while they're there with a content strategy that truly highlights your value proposition (Who are you servicing? What are your services? How do you plan on accomplishing those services?)

Use what you've learned about the capabilities of your website in Tech Foundations 2 to create a content that aligns with your value proposition.

Below is an example website content plan. After reviewing, use the next page to build your own website content plan

What is my value proposition? "I have seven years of real estate experience, selling both commercial and residential properties. My goal is to use my hard-earned skills and expertise to advise home buyers and sellers on the most effective buying and selling strategies and ensure a win-win relationship for everyone."

How can I communicate my value proposition on my website? "By adding pages that highlight my expertise and that provide invaluable information to home buyers and sellers. I will also write weekly blog posts that showcase my current listings and give buyer or seller tips to provide additional value."

What, specifically, do I want to add to my website in order to achieve my goal?
"I will add four new pages to my website: An "About Me" page, a new home buyer's guide, a new home seller's guide and information about local business parks since I do a lot of commercial real estate. I will also implement a plan to write one blog post a week that features either information about my current listings or a specific buyer or seller tip."

MY WEBSITE CONTENT STRATEGY

Creating a content strategy for your RE/MAX agent website

What is my value proposition? ______________________________

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How can I communicate my value proposition on my website? ______________

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What, specifically, do I want to add to my website in order to achieve my goal?

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Tech Foundations 3

Advanced Database Organization
Soft Touch Marketing
Birthday + Anniversary Messages
Personalizing Smart Campaigns
Present

MAKING YOUR CRM WORK FOR YOU

Successfully creating habits within your database.

You've heard it time and time again, but consistency truly is key when it comes to remaining top-of-mind with your contacts! MAX/Tech powered by BoldTrail has everything you need to stay connected, but there are a few things you should be sure to do on a regular basis to make sure you're getting the most out of your tools.

5 SMART CRM TASKS TO KEEP YOU TOP-OF-MIND

1. Keep your contacts' details up-to-date

Your database means nothing if the information included there isn't correct! Once a year, reach out to your contacts to see if anything has recently changed like their phone number, email address or home address. This is a great way to keep the conversation going (or get it started!) and ensure that you still have their permission to contact them regularly.

2. Update your contacts' statuses as they change

Track your contacts throughout their buying or selling journey by consistently updating their status as they move through the client journey from new lead to closed.

3. Include all known details in your contact's 'Profile Details' tab

As you learn more about your contacts, include that information in the 'Profile Details' section of their Contact Record. Their birthday, home anniversary, childrens' names and spousal or partner information are all important for you to know! This information allows you to send more targeted communications, reach out on special days and keep track of what matters most to your contacts.

4. Add hashtags to your contacts as you learn more about them and their needs

As you learn more about your contacts, add that information to their Contact Record as hashtags. For example, if you find out your seller is a big coffee drinker, add a #CoffeeLover hashtag to their record. Or, if you one of your past clients loves golf, add a #Golfer hashtag.

5. Communicate from within Contact Records

While you could email a contact from your own email account or call them from your phone, consider communicating right from MAX/Tech powered by BoldTrail Communicating from within the platform creates a log and history of emails texts and calls And for those times when you connect outside of the system, be sure to log calls, events and communication to keep everything in one place!

TAKE ACTION

While a few of these tasks can be automated within the platform, make them a part of your regular routine by blocking off time or creating reminders for yourself!

SMART CRM SAVED FILTERS

Revolutionizing database organization

Within MAX/Tech powered by BoldTrail, you can create and save filters that allow you to curate hyper-specific lists within your own database that can be used in a variety of different ways.

IDEAS FOR SAVED FILTERS TO CREATE

Saved filters allow you to create curated contact lists and pin them to the top of your Smart CRM for quick access! Here are a few ideas on some saved filters you can create within your own database — along with the steps on how to create each one.

No Birthday

Reaching out on a contact's birthday is a great way to make them feel special and remind them that you care! Create a saved filter that will highlight the contacts that don't have a birthday listed in their Contact Record so you can reach out and ask.

Create this filter by selecting: Client, Contract, Closed, Sphere and No Birthday.

Closed Clients

Stay connected after the sale by keeping the mailing address of your closed clients up-to-date. Create a saved filter that will show your closed contacts that don't have a primary address within their Contact Record.

Create this filter by selecting: Closed and No Primary Address.

Hashtag Lists

Create those hyper-targeted contact lists by filtering your database down by a specific hashtag!

Create this filter by selecting: Sphere, Prospect, New Lead, Active, Client, Contract, Closed and your specific hashtag.

Market Reports

Provide ongoing value to your clients during and after the sale through Market Reports. Create a saved filter that highlights the contacts that don't have a Market Report added to their Contact Record so that you can create one.

Create this filter by selecting: Seller, Buyer, Renter and 'has no market reports.'

Property Interest

Take your prospecting process to the next level by searching for potential buyers for your listing within your own database! Create a specific property interest saved filter for a specific area or price range.

Create this filter by: Input the preferred property interest points in the filters menu. Please note that this will only include contacts with an active search alert applied to their contact record.

TAKE ACTION

On the last page, you learned about saved filters and got a few ideas on filters to save within your own Smart CRM. But the uses for saved filters don't end there!

Take a moment to think about how saved filters could make your business easier. Use the space below to write down your ideas and make a list for saved filters that you'll create within your own MAX/Tech powered by BoldTrail account.

CREATING AND MANAGING HASHTAGS

Important details to keep in mind

As previously discussed, hashtags are customizable labels you can add to your contacts to better organize and segment your database. Not only does it give you the power to personalize contacts based on your business, it also sets the stage for helpful automations and a more targeted communication strategy.

As you begin thinking through your hashtag strategy, below are a few important things to keep in mind.

HASHTAG MANAGEMENT MUST-KNOWS

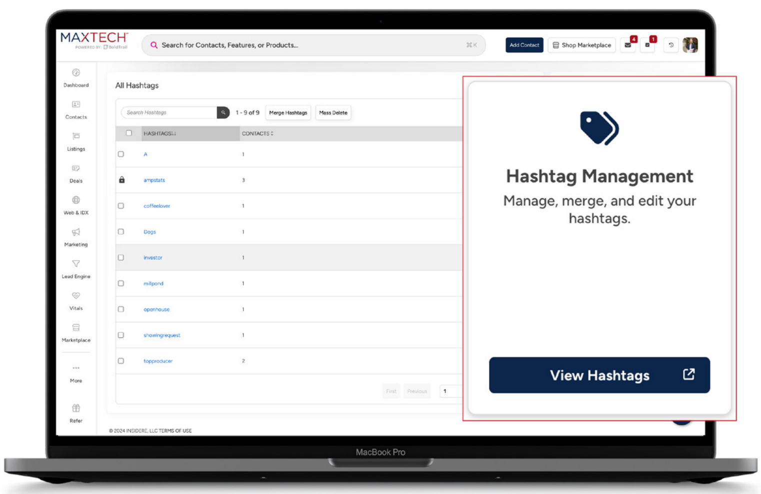
1. Create hashtags without the # sign

2. Remember that spelling matters, capitalization does not

3. If you have spelling errors, you can merge hashtags

4. Hashtags MUST be connected to a contact

5. It’s a best practice to add yourself as a contact + assign all hashtags to your Contact Record



ACCESSING YOUR HASHTAG MANAGER

1. Login to MAX/Tech powered by BoldTrail

2. Navigate to the ‘Marketing’ section

3. Click on ‘Hashtag Manager’

4. Begin adding your hashtags by clicking on ‘Create New Hashtag’

PLANNING YOUR HASHTAG STRATEGY

Organizing your database in a way that works best for you

TAKE ACTION

In Technology Foundations 1, you reviewed a few ideas on hashtags to create. Now it's your turn! Use the spaces below to plan out your own hashtag strategy, marking down hashtags you want to create based on the categories discussed on the previous page. Be sure to note how you plan to utilize each hashtag. Will just be for organizational purposes? Or do you plan to leverage them to create a targeted communication list?

Local Areas

Search Preferences

Urgency Level

PLANNING YOUR HASHTAG STRATEGY
Continued

Interests + Hobbies

Groups + Associations

Campaign Specific

Additional Hashtags

BUILDING YOUR "GET TO KNOW YOU" FORM

Setting the foundation for lasting relationships

On the next page, you'll find a copy of a sample "Get to Know You" form that you can choose to share with your prospective clients to get to know them better!

As you review the "Get to Know You" form, consider what extra information that could be added to help you best support your clients throughout their real estate journey and beyond.

GET TO KNOW YOU

I love getting to know my clients better! This short questionnaire will help me learn more about you so we can build a relationship that lasts long after your real estate transaction.

Date: ______________________ Name: ______________________

Email Address: ______________________

Phone Number: ______________________

What do you do for fun? ______________________

____

____

When is your birthday? ______________________

Do you prefer coffee or tea? ______________________

What is your favorite type of candy? ______________________

What is your go-to snack? ______________________

What is your favorite beverage? ______________________

What about your favorite movie? ______________________

Do you have a favorite color? What is it? ______________________

Favorite book? ______________________

Favorite holiday? ______________________

Favorite type of music? ______________________

If you could have any car you wanted, what would it be? ______________________

What is your dream vacation destination? ______________________

What is your favorite sport to watch? ______________________

What is your favorite sport to play? ______________________

What is your favorite local restaurant? ______________________

LEVERAGING THE "GET TO KNOW YOU" FORM

Taking your outreach strategy to the next level

The 'Get to Know You' form, allows you to gain insight into what makes your clients who they are! While questions like "What is your dream vacation destination?" may seem silly, the information you get from asking them is invaluable. Not only will they appreciate being asked in the first place, but you can use that information to personalize your outreach and strengthen your relationship!

Once your client has filled out the form, there are several ways you can begin using it within MAX/Tech powered by BoldTrail. Let's look at a few examples:

"What do you do for fun?"
This question is a great way to build rapport with your clients. No matter what they say here, add it as a hashtag within their Contact Record. They might say, "I like to read," or "I play basketball with a group here in town," and you can add a #Books or #Basketball hashtag. Then, when you have a book to recommend or know of a local sporting event they might be interested in, you can easily filter your database down to that hashtag and send an email to those contacts.

"When is your birthday?" and "What's your favorite local restaurant?"
Add their birth date to the 'Profile Details' section of their Contact Record and ensure you have automatic birthday messages turned on within MAX/Tech powered by BoldTrail. This will prompt the platform to send an email and/or text on their special day. You could also add a task to their Contact Record, reminding you to pick-up and send a gift card to their favorite restaurant to celebrate.

TAKE ACTION

Those are only some of the ways you can use the information from the 'Get to Know You' form inside of your MAX/Tech powered by BoldTrail system. Use the space below to brainstorm additional ways to leverage it within your business!

BIRTHDAY + HOME ANNIVERSARY MESSAGES

Celebrating your contacts' most special days

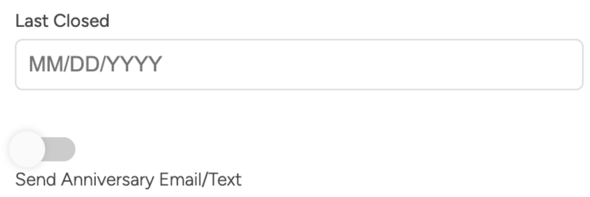
Stay connected with your contacts on their special days with automated birthday and home anniversary messages!

Birthday Messages

A heartfelt birthday wish can go a long way in strengthening relationships and driving engagement with your contacts!

To set automated birthday messages up:

- Visit the Add 'Profile Details' section of a Contact Record and add the contact's **birthday**. Contacts without a birthdate added will not receive birthday messages.
- Turn on the 'Send Birthday Email/Text' switch.
- Visit the Birthdays & Anniversaries tile in the Marketing tab and click the switch next to each contact type under 'Birthdays.'



Home Anniversary Messages

Sending your past clients home anniversary messages is a great way to stay top-of-mind and ensure the next time they think of selling, they think of you!

To set home anniversary messages up:

- Visit the Add 'Profile Details' section of a Contact Record and add the contact's **last closed date**. Contacts without a closed date added will not receive home anniversary messages.
- Turn on the 'Send Anniversary Email/Text' switch.
- Visit the Birthdays & Anniversaries tile in the Marketing tab and click the switch next to each contact type under 'Anniversary of Purchase.'

Note: While you cannot change the contents of the individual Happy Birthday or Happy Home Anniversary email or text, you can change the template using the pre-existing Templates Library or by creating your own.

TAKE ACTION

Pause and take a moment to add five birthdays and five last closed dates to contacts in your database! Last closed dates should be easy to find by reviewing your past client files. However, birthdays may be a little tricker. Utilize resources like contacts' social media accounts to find the information or use this as an opportunity to reach out and make a meaningful connection!

CREATING EMAIL + TEXT TEMPLATES

Adding a personal touch to your communication strategy

Your MAX/Tech powered by BoldTrail account comes pre-loaded with a wide variety of ready-to-use templates that you can use to engage your audience! These email, text, call and task templates can be included in Smart Campaigns, used in scheduled emails or sent to individual contacts.

However, if there is a specific template you are looking for that doesn't currently exist in your Templates Library, you can create one yourself! Use the steps below to create your very own email or text template:

STEPS FOR CREATING A NEW EMAIL OR TEXT TEMPLATE

Step 1: Hover over the Marketing tab in your MAX/Tech powered by BoldTrail account and click on 'Smart Campaigns.'

Step 2: Click on 'Templates' at the top of the page to view your Templates Library.

Step 3: Click 'Add Template,' and choose whether you want to create an email or text template. The process of creating these templates is very similar, but there are more customization options for email templates.

Step 4: Fill out the fields and create your text or email template! When creating emails in MAX/Tech powered by BoldTrail, you can also use the 'Advanced Editor' which will allow you to add images, buttons, links to your social media accounts, videos and more.

Step 5: Once finished with your template, click 'Add Template.' This template will now be available for you to use throughout your database!

TAKE ACTION

Visit your Templates Library and review the list of pre-existing templates. What don't you see in your library? Do you see any gaps that another email or text could fill? Maybe a special email to celebrate a unique holiday like National Coffee Day or National Friendship Day. Maybe a text that highlights a service only you offer.

Use this time to consider how you can leverage this tool to level-up your communication strategy and add additional value to your connections. Then, create an email or text template that helps you reach that goal.

WHAT TO KNOW ABOUT SEARCH ALERTS

How Search Alerts get created + best practices

A Search Alert is an automated email sent from the MAX/Tech powered by BoldTrail platform that contains a list of newly listed and reduced properties that fit specific criteria. There are a few different ways these emails can be created, including:

1. Manually

You can create a Search Alert for a specific contact at any point by visiting their Contact Record and clicking '+Add' next to 'Search Alerts.' When creating, you'll be able to select which criteria will be included in that alert such as area, number of bedrooms, bathrooms, price range, listing type and more. This will prompt the platform to search through your MLS and send any matching properties to your contacts as they are listed or reduced. You can add up to five alerts to any contact.

Manual Search Alerts Best Practices:

- Set your Search Alert to have a 'Dynamic Subject Line' which will change based on the properties it sends.
- For active buyers, be sure to set the send date as 'ASAP' or 'Daily' so they receive information about new properties as soon as possible.
- Finally, as you set up your Search Alert and choose what criteria should be considered, be as broad as possible in order to include any and all listings that may spark interest.

2. On Your Website

A Search Alert can also be created automatically for a contact if they log-into your MAX/Tech powered by BoldTrail website and view a property and they don't already have a Search Alert configured. This alert's criteria will be chosen based on the property/properties the contact viewed within 24-48 hours of logging in.

3. Automatically by Hashtags

Search Alerts will also automatically be added with hashtags! You can do this by visiting the 'Search Alerts' tile in the Marketing section of your platform. From there, you can create a new Search Alert and connect a specific hashtag. Then, any contact with that hashtag will now automatically be assigned that Search Alert. If you are leveraging lead generation tools like Squeeze Pages or Landing Pages, this is a great tool to lean on to add additional value to your leads!

TAKE ACTION

Now that you understand what Search Alerts are and how they are created, it's time to add your own! Visit your Smart CRM and choose five contacts to manually add unique Search Alerts to.

Choose contacts you know would benefit from having this type of automation like current buyer clients, buyer leads or past clients who may be interested in learning about new listings in their area.

WHAT TO KNOW ABOUT MARKET REPORTS

How Market Reports get created + best practices

A key component to successfully communicating your value is sending the right information at the right time. Automated Market Report emails allow you to build your reputation as an authority on real estate in your local market and keep your contacts updated on the current market trends. Just like with Search Alerts, Market Reports can be created in a few different ways, including:

1. Manually

You can create a Market Report for a specific contact at any point by visiting their Contact Record and clicking '+Add' next to 'Market Report.' You'll simply add an area from within your MLS and then choose how often you want the platform to send these emails to your contact. Keep in mind that Market reports will only be available in areas where the local MLS provides sold data as part of the feed.

Manual Market Reports Best Practice:

- Set your Market Report to send every 28 days. If you set it any earlier, the information may not change significantly enough to actually provide any value.

2. On Your Website + Squeeze Pages

Market Reports can also be automated by visiting the 'Market Reports & Valuation Settings' tile in the Marketing section of your platform. Here, you can choose to turn on automatic Market Reports, which will be added to any contact who is signed into your website and views a property. The area of that property will be used to create the Market Report.

Consumers can also subscribe to regular Market Reports from any Market Report Squeeze Page you create and share.

3. Automatically Based on Search Alerts

In the same 'Market Reports & Valuation Settings' section, you can also choose to turn on automatic Market Reports for contacts who have a Search Alert set-up but no Listing Valuation or Market Report. The platform will use the area of their existing Search Alert to inform which area will be highlighted by the Market Report.

Note: Keep the amount of communications you are sending to your contacts on a regular basis in mind. More doesn't necessarily equal better! Ensure everything you are sending to your contacts is intentional and adds value to their lives.

TAKE ACTION

Now that you understand what Market Reports are and how they are created, it's time to add your own! Visit your Smart CRM and choose five contacts to manually add Market Reports to.

Choose contacts you know would benefit from Market Reports such as current seller clients or past clients who may be interested learning about their local market.

Smart Campaigns within MAX/Tech powered by BoldTrail are more than just your average drip campaigns! These campaigns can include emails as well as texts, call reminders, tasks and more to help create a seamless communication plan that keeps you top-of-mind with your audience.

As a RE/MAX agent, you already have access to a library of pre-existing Smart Campaigns that you can turn on at any point. While these campaigns have been carefully crafted with real estate best practices in mind, there are times you may want personalize them to better fit your voice and business goals. To do this, you'll need to clone the campaign!

CLONING AN EXISTING SMART CAMPAIGN

Cloning, or "copying," a campaign allows you to truly make a campaign your own by updating the settings, actions and audience.

Step 1: Find the Smart Campaign you'd like to clone and click the checkbox next to the campaign's name.

Step 2: Click the button in the right corner of the screen to clone the campaign.

Step 3: Turn off the original Smart Campaign by clicking the blue switch.

Step 4: Make your changes!

- Edit the pre-existing emails or texts to better fit your voice.
- Remove any actions that don't make sense for your goals.
- Add new actions like emails, texts, call reminders, status changes, hashtag additions or tasks.
- Update the campaign's triggers or audience.

Note: You can access even more existing Smart Campaigns in the 'BoldTrail Library' section of your Smart Campaigns manager. However, these do not need to be cloned in order to personalize them. Instead, simply click the 'Add to My Library' button and click into the campaign to make your changes!

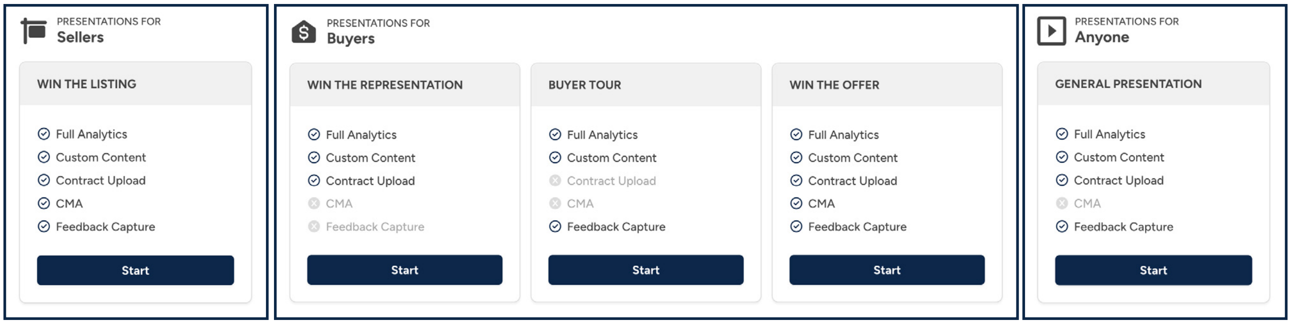
TAKE ACTION

Your turn! Visit your Smart Campaigns manager and review the pre-existing campaigns. If you see one you'd like to personalize, clone it and follow the steps above. If you don't, head to the System Library section to find one.

TAKE ACTION

MAX/Tech powered by BoldTrail's Present tool allows you to create stunning presentations, Comparative Market Analysis (CMA) reports and buyer tours to wow your leads, clients and past working relationships! Use this opportunity to play around with Present.

Please keep in mind that some features within Present may not be available in areas where sold data is not fed from the local MLS.



LISTING + BUYER PRESENTATIONS

With Present, you can create a stunning presentation that outlines the RE/MAX value proposition, the many benefits of working with you, your process and any other important information you want to highlight. Use the extensive System Library or add your own slides to personalize every level of your presentation. And with real-time activity tracking, you can see which slides the viewer found most interesting and use that information to guide future conversations!

DATA-RICH CMAS

A Comparative Market Analysis or CMA is a fantastic tool to help paint a comparative pricing picture for sellers looking to list or buyers presenting an offer. Simply enter the address of the property and Present will do the rest, pulling comparable property data directly from your MLS that fits your specific criteria. Make as many changes as needed by adding or removing properties and including additional quotes.

BUYER TOURS

Add an interactive element to your showings! Create a buyer itinerary that includes all of the homes you plan to show and send it the night before. Allow your buyers to digitally preview and rank all of the listings. Then, print out the updated version for them to take notes as you visit properties.

PRESENT CUSTOMIZATION

Important personalization settings you should know about

TAKE ACTION

Present's listing and buyer presentations are beautiful and professional right out-of-the-box, however there are a few settings you can update to better personalize them to your brand and business!

Use the checklist below to update these settings and ensure every one of your presentations has the look and feel you want.

PRESENT CUSTOMIZATION SETTINGS CHECKLIST

Visit the 'Customization Settings' page within Present to access the following:

- [ ] **Add Your "About Me"**
  Who are you and what do you want potential clients to know about you? Craft a new agent bio (or use the same one from your MAX/Profile) to be included as a slide in your future presentations. Add information about your professional and educational background, your passions and why you do what you do to engage your audience and remind them of your expertise.

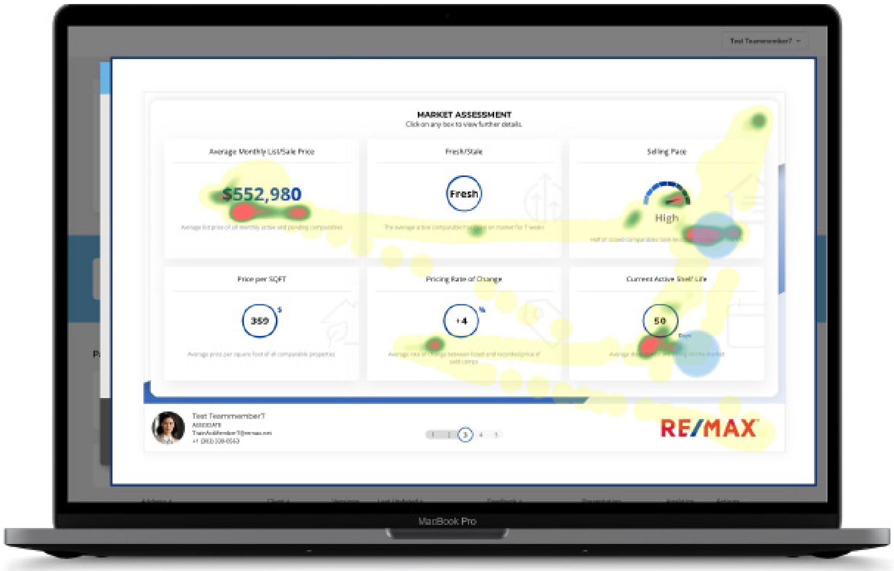
- [ ] **Add Testimonials**
  Give potential clients an opportunity to hear from people who have worked with you in the past while adding a level of credibility to your presentations. Right on your about me page, you can include up to three testimonials from past working relationships to be included in every presentation along. Include a link to your favorite testimonial site on this page too for when you send presentations digitally!

- [ ] **Choose Your Default Layout**
  Present offers three default layouts for your presentations: Traditional, Modern and Luxury. Choose the one you plan on utilizing the most often to streamline the presentation creation process. Don't worry, you'll be able to change the layout of individual presentations if you find your default one isn't fitting the bill.

REVIEWING PRESENT ANALYTICS

Open the door to potential questions + deeper conversations

With Present, you are able to review helpful analytics that allow you to learn more about what is most important to buyers and sellers. By reviewing these analytics before a meeting, you will have a better understanding of what your client value most and where to guide the conversation.



3 ANALYTICS TO REVIEW WITHIN PRESENT

☐ **1. The Average Time Spent Section**

The average time spent section will show you how long (on average) your prospective seller spent on the presentation during each visit. Then, the platform breaks it down by showing you how long they spent on each slide. This is very valuable information! Take note of which slides they spent the most time on and use this data to inform your future conversations.

☐ **2. Page Views**

In addition to telling you which pages the seller visited, the platform will also tell you which pages they revisited and how many times. You can also see which pages had no views by clicking on “show pages with no views.”

☐ **3. The Heat Map**

One of the most valuable analytic features within Present is the Heat Map! Just like many people follow a line of text with their fingers while they are reading, many electronic users do the same thing with their mouse cursor. Your platform takes advantage of this habit to create a heat map for you to review. This means that you can see not only which slides the seller visited the most, but also where on the slide they spent the most time. This could be a word they didn’t understand or something they found really interesting.

Be sure to use what you learn from the heat map and casually introduce the things they spend time on into your conversation, finding new ways to provide value.

PRESENT ACTIVITY

Creating your own listing presentation

TAKE ACTION

It's your turn! Work through the steps below to create a listing presentation within Present using your own address.

- [ ] **Step 1:** Log into MAX/Tech powered by BoldTrail and navigate to Present.

- [ ] **Step 2:** Click 'Win the Listing' and enter your own property address.

- [ ] **Step 3:** Use the filters and map to pull in comparable listings.

- [ ] **Step 4:** Review the existing listing presentation slides and add a few new ones using the Present slides library.

- [ ] **Step 5:** Send it to yourself via email and interact with the presentation.

- [ ] **Step 6:** Revisit Present and look at the presentation's analytics.

- [ ] **Step 7:** Once you've reviewed everything the analytics have to offer, answer the following questions:

  What did you learn from your presentation's analytics?

  How could you leverage these analytics in the future?

YOUR NEXT STEPS

Keeping up the momentum after completing Tech Foundations 3

Congratulations on completing the third module of the Tech Foundations Boot Camp! You've taken one more monumental step on the journey to mastery.

Keep the momentum going by spending a few minutes each day using your technology. Not sure where to start? Here are four next steps to help you build daily habits with your tools:

- ☐ 1. Create a hashtag strategy that includes geographic areas, areas of interest and property needs. Apply all hashtags to yourself.
- ☐ 2. Create and save search filters that will keep your Smart CRM up-to-date and accurate.
- ☐ 3. Review all default Smart Campaigns and create a plan to clone and modify t those that don't fit your personal voice and brand.
- ☐ 4. Complete the Present activity on the previous page.

Tech Foundations 4

Lead Engine Solutions
Website Content Strategy
Listing Marketing
Personal Marketing

DISCOVER THE RE/MAX MARKETING PORTAL

Access marketing materials to support your brand + business

You can take advantage of the established name and image of RE/MAX by leveraging the branded marketing materials on the RE/MAX Marketing Portal, accessible within MAX/Center. Here, you'll find current brand standards, print marketing materials, property signs and even regularly updated social media graphics.

TAKE ACTION

It's time for a scavenger hunt! Visit the RE/MAX Marketing Portal and locate the following materials:

- ☐ **The RE/MAX Brand Identity Manual**

  Locate and download this manual to ensure your personal branding such as logos and signage aligns with the company's.

  Hint: You can find this manual in the 'Brand' section.

- ☐ **A RE/MAX Logo File**

  Find and download an official RE/MAX logo to leverage in your own marketing.

  Hint: You can find these files in the 'Logos' section.

- ☐ **A RE/MAX-Branded Social Media Graphic**

  Access a collection of branded social media and messaging that is ready for you to use. Pick one, download it and post it to start engaging your followers!

  Hint: You can find these graphics in the 'Digital & Social' section.

- ☐ **Review Current RE/MAX Claims**

  As a part of the brand, you are able to leverage statistics and claims about the company within your own business.

  Hint: You can find current claims in the 'Claims & Slogans' section.

- ☐ **Access Current Ad Campaign Files**

  Take advantage of the annual marketing materials already created by RE/MAX HQ by downloading graphics, web banners, email signatures and more from the current RE/MAX National Advertising Campaign.

  Hint: You can find current ad campaign files in the 'Logos' section.

YOUR LEAD ENGINE TOOLS

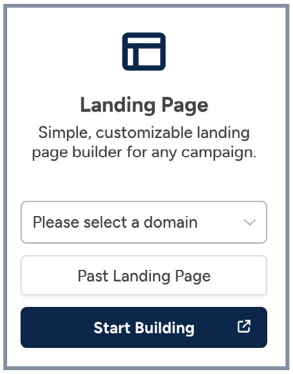
Harness the power of the web to grow your business!

Your MAX/Tech powered by BoldTrail account comes packed full of lead generating solutions like simple, customizable landing pages, information-packed squeeze pages and useful text codes that you can incorporate into your lead generation strategy.

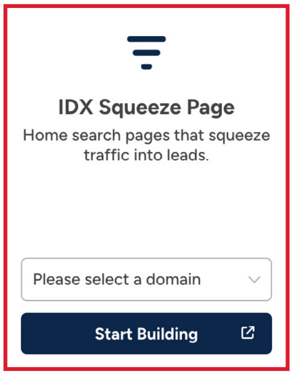
LANDING PAGES

A landing page is a single webpage that doesn't live on your website navigation. It is designed to collect contact information from leads and funnel them into your database..

These pages will often offer real estate-focused resources to a visitor such as buyer's guides, listing information, local market overviews and more in exchange for their email address, phone number or home address. With MAX/Tech powered by BoldTrail, you can create unlimited custom landing pages to perfectly suit your business needs!



SQUEEZE PAGES



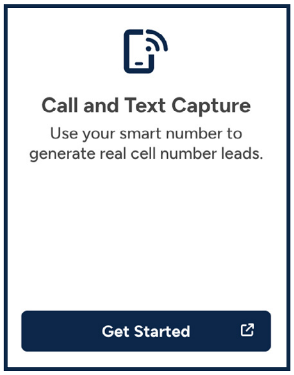
A Squeeze Page allows you to "squeeze" information onto one page on your website, providing visitors with exactly what they expect to see when they click on the link. That makes these pages perfect for sharing on social media or using in web and social media ads!

With Squeeze Pages, you can highlight multiple properties that fit specific parameters, a single property, an interactive home valuation tool or a local market report without cluttering your website navigation.

TEXT CODES

A long link added to any type of print marketing like brochures signs can look messy and hard for your audience to digest. Text Codes offer an easy way for a potential customer to get in touch, for example adding "Text 'HOME' to 555-5555 for information about this property" to a listing flyer or sign rider!

These codes are connected to your office Smart Number so any lead generated by texting codes you create are automatically added to your Smart CRM.



CREATING CONTENT WITH VALUE

Providing a lasting resource

Your MAX/Tech powered by BoldTrail website is an incredible solution that allows you to promote your personal brand and listings to consumers all over the world! While your website is ready for you to begin using on day-one, you can take the extra step to personalize your site with custom pages that add additional value to both prospective and current clients' lives.

IDEAS FOR CUSTOM WEBSITE PAGES

Community Info

Add detailed community pages for areas you serve

Local Businesses

Spotlight local vendors you work with + trust

Things to Do

Highlight all the things to do in your community

Real Estate Process

Provide in-depth buyer/seller resources

Investment Strategies

Rental property considerations, flipping houses guide

TAKE ACTION

Take a look at the collection of ideas above. What's missing? Can you think of any additional pages you would want to add to your website? Reflect on what you uniquely offer your community as a local real estate expert. How can you leverage the power of your website to highlight what sets you apart from the crowd? Use the space below to write down your ideas!

WEBSITE CONTENT STRATEGY EXAMPLE

Creating a content strategy for your RE/MAX agent website

TAKE ACTION

Your website is your digital homebase. This is where most people will go to learn more about you, your listings and your services. Make sure you are leaving a good impression on your website visitors while they're there with a content strategy that truly highlights your value proposition (Who are you servicing? What are your services? How do you plan on accomplishing those services?)

Below is an example website content plan. After reviewing, use the next page to build your own website content plan.

What is my value proposition?
"I have seven years of real estate experience, selling both commercial and residential properties. My goal is to use my hard-earned skills and expertise to advise home buyers and sellers on the most effective buying and selling strategies and ensure a win-win relationship for everyone."

How can I communicate my value proposition on my website?
"By adding pages that highlight my expertise and that provide invaluable information to home buyers and sellers. I will also write weekly blog posts that showcase my current listings and give buyer or seller tips to provide additional value."

What, specifically, do I want to add to my website in order to achieve my goal?
"I will add four new pages to my website: An "About Me" page, a new home buyer's guide, a new home seller's guide and information about local business parks since I work with a lot of the companies who relocate employees to this area. I will also implement a plan to write one blog post a week that features either information about my current listings or a specific buyer or seller tip."

MY WEBSITE CONTENT STRATEGY

Creating a content strategy for your RE/MAX agent website

What is my value proposition?

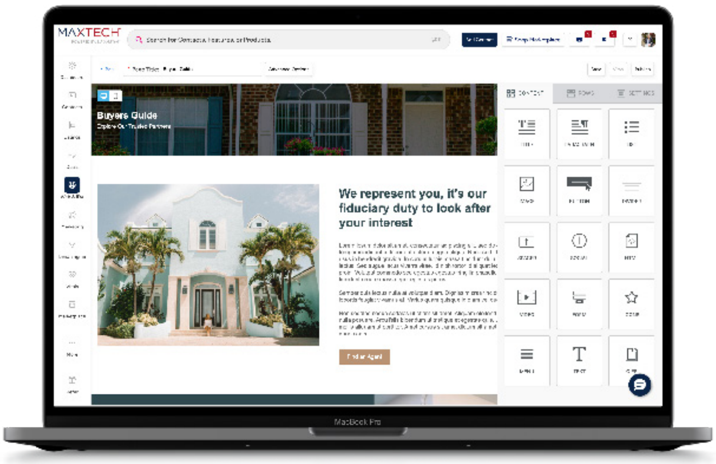
How can I communicate my value proposition on my website?

What, specifically, do I want to add to my website in order to achieve my goal?

WEBSITE SETTINGS + CONTENT

Use pre-designed templates to personalize your site

MAX/Tech powered by BoldTrail websites are an incredible tool that allow you to promote your personal brand and listings to consumers all over the world! While these websites are ready for you to begin using on day one, you can take the extra step to personalize your site with custom pages that add value to consumers.



WEBSITE SETTING CUSTOMIZATION OPPORTUNITIES

1. Update your theme and layout
2. Add testimonials to your website
3. Manage and modify area pages
4. Create custom pages based on your strategy
5. Write and publish blog posts based on your strategy

CUSTOM PAGE TEMPLATE OPTIONS

1. **About (me + us):** Go beyond the bio page
2. **Guides + Resources:** Buyer and seller guides and other related resources
3. **Landing + Lead Capture Pages**: Similar to lead generation pages
4. **Listings:** For more customized marketing

AVAILABLE CONTENT BLOCKS

1. Text blocks to easily add paragraphs, lists, titles and more
2. Visual blocks for images, gifs and video options
3. Form blocks for calls-to-action or simple searches
4. Social media blocks to connect with visitors
5. Design blocks, spacers, dividers, buttons and icons
6. HTML blocks for more advanced users

NEW WEB PAGE CHECKLIST

Ensure each new web page makes the biggest impact

TAKE ACTION

As you create new pages for your website, refer to the checklist below. This list of tasks will allow you to ensure every page you create provides value, makes an lasting impact on your audience and can be seen far and wide across the internet.

- [ ] **Understand What Your Audience Wants**

  Before you even sit down to create a new page, you need to identify your target audience. Who is this content for? And what content would they find helpful? New pages that don’t speak to your target audience and their needs are counterintuitive and should not be created.

- [ ] **Be Intentional with Keywords**

  Search Engine Optimization (SEO) determines how high you rank on search engines like Google, thus determining how easily consumers can find you. Adding important “keywords” can help boost your SEO. As you create a new page, consider adding terms you know consumers search for like your city name, specific real estate terms and local business names.

- [ ] **Use Local Images**

  Add a personal and eye-catching touch to your new page with local images! These can be images that you’ve taken or have paid a professional to take. **Note**: Do not use images that you don’t have permission to use to avoid copyright infringement.

- [ ] **Create a Clear Call-to-Action**

  What do you want consumers to do on this webpage? Visit a squeeze page you’ve created for the area? Click to a landing page to download a buyer guide? Contact you directly? Include a call-to-action on your page that will guide the visitor through the experience and move them further down your lead conversion funnel.

- [ ] **Let the World See Your Hard Work**

  Once you’ve completed your new page, let the world see it! Share the link on social media to announce your new resource and drive viewers to your website.

ADDING ADDITIONAL VALUE WITH BLOGS

Connecting with your audience on a more personal level

Think of the pages on your website as “static” content. This is content that doesn’t change often and isn’t time-bound like buyer or seller guides and local community information. However, sometimes, you may want to post more “dynamic” or time-sensitive content on your website like information on upcoming events, small business spotlights, property highlights or local market insights. This is where your blog comes in!

Your MAX/Tech powered by BoldTrail agent website already comes with a blog built-in that you can begin using right away. Think of this as your real estate journal. Here, you can create additional, valuable content that highlights your expertise on both real estate and within your community.

IDEAS FOR BLOG POSTS TO CREATE

Client Adventures

Share client testimonies to highlight the service you provided

Home Staging

Write about best practices + include before/after photos of listings

Business Spotlight

Highlight a local business + link to their website, include photos and videos

Home Renovations

Insights into projects that provide a ROI, highlighting local service providers

Market Trends

Beyond the numbers, how do you interpret the local market trends + stats

TAKE ACTION

Take a look at the collection of blog post ideas above. Are you feeling any sparks of inspiration? How could you use a blog to add additional value to consumer lives? Write down your ideas in the space below!

MY BLOG CONTENT STRATEGY

Creating a content strategy for your blog

TAKE ACTION

Now that you have a few blog post ideas in your head, use this Blog Content Strategy Worksheet to plan out your blog posts for the next month! Try to commit to posting at least once a week.

Blog Post Title: ______________________________

Date of Posting: ______________ **Audience:** ______________

What will this blog post be about?

Why would this post be valuable to my audience?

Blog Post Title: ______________________________

Date of Posting: ______________ **Audience:** ______________

What will this blog post be about?

Why would this post be valuable to my audience?

MY BLOG CONTENT STRATEGY
Continued

Blog Post Title: ____

Date of Posting: ____________________ **Audience:** ____________________

What will this blog post be about?

Why would this post be valuable to my audience?

Blog Post Title: ____

Date of Posting: ____________________ **Audience:** ____________________

What will this blog post be about?

Why would this post be valuable to my audience?

TAKE ACTION

Once you have completed and posted a blog post, don't forget to show it off! Post a link on social media to promote it. And if you highlighted any local businesses or a specific listing, be sure to let the business and property owners know so that they can share it too.

NEW LISTING MARKETING CHECKLIST

Creating duplicable systems + processes

Success stems from duplicable systems and processes! By creating a consistent marketing plan for all your new listings, you can streamline your business processes, show potential sellers what they can expect and make it easier to scale your businesses in the future.

Below, you'll find an example marketing checklist that you can use to create that consistent process using their MAX/Tech powered by BoldTrail solutions.

- [ ] **Step #1** - Place a property sign.
    - [ ] Access brand approved signs within the RE/MAX Marketplace.
    - [ ] Add a sign rider that includes a text capture code.
- [ ] **Step #2 -** Upload the listing to the MLS.
    - [ ] Add listing details filled out within the MLS.
    - [ ] Keyword the specific description of the property.
    - [ ] Upload professional photos of the listing to the MLS.
- [ ] **Step #3** - Prepare marketing materials.
    - [ ] Access the automated materials created by ListingMachine.*
    - [ ] Create Photofy graphics to be posted to social media.
    - [ ] Create a listing video within RE/MAX Hustle.
    - [ ] Access additional DesignCenter marketing designs.*
    - [ ] Integrate Lead Engine tools when possible to collect leads.
- [ ] **Step #4** - Spread the word throughout your sphere.
    - [ ] Send the listing via email or text to individual contacts.*
    - [ ] Leverage the matching buyers feature in MAX/Tech powered by BoldTrail.*
    - [ ] Promote the listing to curated groups based on hashtags.*
    - [ ] Promote the listing to followers on their social media accounts.*
    - [ ] Utilize Lead Engine tools to capture lead information.
- [ ] **Step #5** - Host an open house.
    - [ ] Enter the open house information into the MLS.
    - [ ] Promote the open house with your MAX/Tech marketing solutions.
    - [ ] Use the MAX/Tech powered by BoldTrail Open House app during the event.
- [ ] **Step #6** - Connect to the surrounding area.
    - [ ] Create a PropertyBoost ad for Facebook.*
    - [ ] Door-knock throughout the listing's area.
    - [ ] Leverage automatically created postcards from ListingMachine.*
    - [ ] Print automatically created flyers to hand out to neighbors.*
    - [ ] Dive into DesignCenter to create additional marketing assets.*

***Complete these tasks directly from the Listing Details Page in MAX/Tech Powered by BoldTrail.**

STEP #1: PLACE A YARD SIGN

Successfully creating habits within your database.

One of the most important and impactful listing marketing tasks you can do is simply placing a sign in the front yard! A sign makes the home itself an advertisement, letting everyone in the area know that this home is now for sale (or, coming soon). And, as a RE/MAX professional, you have the added benefit of being able to use the company name to market your listing with a RE/MAX-branded sign!

While you can purchase property signs from a wide variety of vendors, RE/MAX HQ has provided a list of vetted approved suppliers to choose from who all adhere to the company brand guidelines. You can access this list inside of the RE/MAX Marketplace, which includes approved suppliers for signs as well as apparel, posters and brochures, digital marketing and more.

TAKE ACTION

Work through the steps below to navigate to the RE/MAX Marketplace and locate an approved supplier to purchase yard signs from.

- [ ] 1. Log into MAX/Center with your remax.net credentials.
- [ ] 2. Locate the 'RE/MAX Marketplace' tile either in the Apps & Tools section or by typing 'Marketplace' into the search bar.
- [ ] 3. Hover your mouse over the 'Yard Signs & Listing Marketing' button from the menu. Click on either 'Canadian Yard Sign Suppliers' or 'Yard & Office Signs' if you are from the United States.
- [ ] 4. Choose a supplier! Click on their logo to learn more about them and see what they have to offer. Then, follow the links to their website to choose and purchase your yard signs.

STEP #2: UPLOAD YOUR LISTING TO THE MLS

Crafting an impactful listing description

Before you can officially list the home, you'll need a listing description! This write-up will appear not only within your MLS, but also your website, other RE/MAX sites and a variety of popular real estate search sites. That's why it needs to be descriptive, appealing and attractive.

Be descriptive about key details of the home. Refer back to your notes with the sellers early on about what they believe are the selling features of the home. Think about the elements that a potential buyer might be interested in. Are there recent updates? What about nearby businesses, restaurants or dog parks?

TAKE ACTION

Consider the following scenario: You're getting ready to list a home in the nearby development of Amazing Hills and need a listing description before you can upload it to the MLS. Use the property information and the space below to write an interesting and compelling description for your new listing.

Property Information:

- 3BR + 2.5BA
- $450,000
- Location: Awesome Hills, close to a nice hiking trail and near a new shopping center
- Amenities: 4 car garage, pool, new appliances in the kitchen and a finished basement with a dance floor and disco ball.
- Sellers mentioned that they love the quiet street, the refinished hardwood floors
- and the large dining room.

Your Listing Description:

STEP #3: PREPARE MARKETING MATERIALS

Leveraging tech to create marketing materials for your listings

Once you have placed your sign and officially listed your property, it's time to begin creating physical and digital marketing materials like flyers, brochures, social media posts and more.

You've already explored marketing solutions like RE/MAX Hustle and Photofy, but MAX/Tech powered by BoldTrail offers additional solutions to help market your listings: ListingMachine and DesignCenter!

LISTINGMACHINE

Take the hassle out of creating marketing materials with ListingMachine. This solution, built right into MAX/Tech powered by BoldTrail, creates consistent marketing materials for every stage of a listing's lifecycle using something called listing kits.

By default, a listing kit has already been created to help promote your new listings. The Default Listing Kit will create beautifully branded and personalized marketing assets for both print and digital use automatically. This kit cannot be edited, but it can be turned off if you'd so choose. You have the option to create as many new listing kits as you need to better fit your unique listing marketing plan.

Pro tip: Connect your social media accounts to automate posts about your listings!

DESIGNCENTER

Whether you're looking to advertise your business or promote your listings, DesignCenter has a ton of eye-catching templates you can customize in just a few clicks from flyers and postcards to social media graphics.

TAKE ACTION

Visit DesignCenter within MAX/Tech powered by BoldTrail and choose a template. Then, work through the checklist below to customize it!

- [ ] Update Text + Logos
- [ ] Add Additional Photos
- [ ] Update Listing Information

Happy with your design? Share it to social media, download it or send it directly to your clients within your Smart CRM via email or text.

BOOSTING YOUR SOCIAL PRESENCE

Seamlessly create social media ads with Property Boost

Looking to invest some dollars into your listing marketing plan? Property Boost offers a simple way to market your listings on Facebook.

"Boosting" your new listing online is a great way to generate leads and impress your sellers all in one go.

HOW TO CREATE AN AD WITH PROPERTY BOOST

☐ **1. Find the Listing**
Before you can create your ad, you'll need to find it within your Listings Manager in MAX/Tech powered by BoldTrail. If you haven't added your new listing to the MLS yet, now's the time!

☐ **2. Start Building**
Click on "Boost Property" to start building your digital advertisement.

☐ **3. Customize Your Ad**
Choose the type of boost (you can choose from listing, open house, price reduction and sold but keep in mind that this is only available in areas where the MLS shares sold data.) You can also select a new listing photo and add any compliance information as may be required in your local market.

☐ **4. Choose Your Pricing Plan**
Find the best pricing plan that works for you and your budget and input your billing information.

☐ **5. Check Out**
Click the 'Complete Checkout' button to complete your purchase and save your ad. Keep in mind that once set, Property Boost ads take 24-48 hours to go live.

Pro Tip: Add the seller info as you build your ad so that they get regular updates on your advertising efforts!

You've heard it a million times: real estate is a relationship business. No matter how long you've been in the business, you probably have cultivated a few relationships here and there throughout your life. As you input those people into your Smart CRM, they become more than just a contact, they're now a marketing opportunity!

Everything within MAX/Tech powered by BoldTrail is connected, giving you the chance to leverage your database to find potential buyers for your new listing. There are three major ways you can accomplish this:

SENDING LISTING EMAILS TO YOUR SPHERE

Once you have a new listing, you can easily send it to another contact from right inside of the listing details page. This is a great solution to lean on if you can already think of someone who may be interested in seeing the property.

FINDING MATCHING BUYERS

From within the listing details page, click 'Find Matching Buyers.' The system will go to work to find any contacts within your database who have a Search Alert set-up to alert them of properties that fit their parameters. If your listing falls within those parameters, you'll be able to seamlessly send them the listing information.

LEVERAGING HASHTAGS

If you attended Tech Foundations 3, you'll know all about hashtags and everything they can help you do within MAX/Tech powered by BoldTrail and will have already created area-specific hashtags. However, if you haven't, now is a great time to do so!

Hashtags allow you to filter down your database to create hyper-targeted contact lists. It is highly recommended that you create area-specific hashtags for the areas that you most often do business in and add them to contacts that either live there or are interested in moving there. That way, when you have a new listing in that area, you can simply filter down your database and send the property information to neighbors and other interested contacts.

STEP #5: HOST AN OPEN HOUSE

Getting started with the Open House App

An open house is a great way to promote your listing to potential buyers while also capturing new leads for future business! However, as you host your open house, you need a way to successfully gather the contact details for any guest that attends. These details allow you to follow-up at a later time

Luckily, the MAX/Tech powered by BoldTrail Open House App acts as a digital sign-in sheet that you can use to register guests while also funneling their contact information directly into your Smart CRM! Use the following steps to get started with the app and set up your first open house.

THE MAX/TECH POWERED BY BOLDTRAIL OPEN HOUSE APP

- [ ] **1. Download the MAX/Tech powered by BoldTrail Open House App**
  Instead of using your device's app store, download the RE/MAX branded version of the app from your MAX/Tech powered by BoldTrail dashboard.

- [ ] **2. Select Your Listing**
  Use either the address or MLS ID of the property to start setting up an open house through the app.

- [ ] **3. Choose Your Questions**
  Select the fields you would like to include on your open house sign-in form. Name and email address are the only required fields, however, we strongly encourage you to ask for a phone number; if they're working with an agent; and where they heard about your open house so you can get a more complete picture.

- [ ] **4. Select Which Home Features to Display**
  Now you can select which home information will appear on the sign-in screen. Choose whether you want the listing price, number of bedrooms and bathrooms, the square footage and even another home image to appear on the screen.

- [ ] **5. Choose Which Hashtags Should Be Attached to Your New Contacts**
  Once an attendee has signed-in, their contact information will automatically be added to your Smart CRM with your chosen Hashtags. As a best practice, we recommend including a general open house Hashtag, an area Hashtag and any Hashtags you created for this open house across your marketing efforts.

- [ ] **6. Select a Security Code**
  Choose a security code that will allow you to lock your device from attendees so that they cannot navigate away from the sign-in sheet. This should be something you can easily remember, as you'll use it to get back to your device when the open house has concluded.

- [ ] **7. Officially Kick-off Your Open House**
  You can now use the app to sign visitors into your open house!

STEP #6: CONNECT TO THE SURROUNDING AREA
Mastering the art of door knocking

While a lot of marketing can be done from behind your screen, there are some cases where an in-person interaction can make all the difference! Going door-to-door in a specific area is a great way to promote yourself, upcoming open houses and even a new listing in the area.

However, before you head out to begin your door knocking journey, keep these best-practices in mind:

- [ ] Research the area or targeted demographic beforehand.
- [ ] Have a prepared script.
- [ ] Have your prepared marketing materials and business cards.
- [ ] Dress professionally and with something identifiable to RE/MAX.
- [ ] Have a creative way to gain contact info and easily input it on the go.

TAKE ACTION

Use the space below to craft your door-knocking script. Once complete, practice with a peer to gain confidence!

INTRODUCING SOCIAL

Lean on your MAX/Tech solutions to post consistently on social media

In 2024, 4.95 billion people worldwide use social media, with the average person spending 2.5 hours on social media a day. That means if you aren't joining in online to connect with your audience and promote your brand and listings — you could be missing out on a ton of potential business!

Luckily, MAX/Tech powered by BoldTrail offers a tool to help you stay engaged and create a consistent social media posting schedule: Social.

Social connects to your social media accounts and will generate articles to post based on topics you select at a cadence you determine, up to four days a week. It will also post holiday announcements on holidays you choose, adding an additional stream of content to your social media schedule!

GETTING STARTED WITH SOCIAL

It only takes three simple steps to get started with Social:

1. Connect Your Social Media Accounts

If you already connected your social media accounts to ListingMachine and DesignCenter, then you're already one step ahead! If not, now is your chance. Visit Social within MAX/Tech powered by BoldTrail, click 'Settings and Performance' and 'Edit' your social media connections. From there, you can connect your Facebook and LinkedIn accounts.

2. Select Your Article Topics

While in the 'Settings and Performance' screen, click 'Edit' under the Articles section. Select which article topics you want Social to post on your behalf. Choose from topics like "Real Estate," "Food," "Architecture" and more. Then, select which days you want the platform to post on.

3. Select Your Holidays

Lastly from the 'Settings and Performance' screen, click 'Edit' under the Holidays section. Then, select which holidays you want Social to post celebrations for like Mother's and Father's Days, New Year's Day, Easter and more.

Pro Tip: Once you have set your posting preferences within Social, you'll be able to see upcoming posts on the Social Calendar! Listing posts generated by any Listing Kits will also appear here.

Please keep in mind that Social should not be a replacement for interacting and connecting with your followers online. Instead, this tool should be used to supplement your existing posting schedule and fill in any gaps.

CREATING A SOCIAL MEDIA CALENDAR

Building consistent digital habits to promote your business

Consistently engaging on social media is one of the best things you can do to promote your brand, business and listings! At the beginning of each month, take some time to plan out your posts for the next few weeks. Use a mix of content like articles or blog posts, tips from popular DIY websites and (of course) your listings to keep your followers informed and entertained.

By planning ahead, you can take advantage of automation solutions like Social, ListingMachine and Photofy! Check out the example social media calendar below. Keep in mind that this is just an example. As you build your own, be sure to personalize your content to your brand and local market.

MONTH: DECEMBER 2023

EXAMPLE

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
					1 *PHOTOFY GRAPHIC: DAY IN THE LIFE OF AN AGENT*	2
3	4 *LISTING KIT GRAPHIC: NEW! 100 MAIN STREET*	5 *SOCIAL AUTOMATED POST*	6	7 *SOCIAL AUTOMATED POST*	8	9
10	11	12 *SOCIAL AUTOMATED POST*	13 *HOLIDAY: NATIONAL COCOA DAY*	14 *SOCIAL AUTOMATED POST*	15	16
17	18	19 *SOCIAL AUTOMATED POST*	20	21 *SOCIAL AUTOMATED POST*	22 *AREA SPOTLIGHT: LOWER HIGHLANDS*	23
24	25 *PHOTOFY GRAPHIC: MERRY CHRISTMAS*	26 *SOCIAL AUTOMATED POST*	27 *PERSONAL POST: SPENDING TIME WITH FAMILY*	28 *SOCIAL AUTOMATED POST*	29	30
31	1 *PHOTOFY GRAPHIC: HAPPY NEW YEAR*					

TAKE ACTION

Now it's your turn! Use the blank calendar below to plan out your posts for the next month. As you plan, consider the different platforms you'll want to post on, like Facebook, Instagram, TikTok, X (Twitter), LinkedIn, etc. and plan accordingly.

MONTH:

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY

YOUR NEXT STEPS

Keeping up the momentum after completing Tech Foundations 4

Congratulations on completing the fourth module of the Tech Foundations Boot Camp! You've taken one more monumental step on the journey to mastery.

Keep the momentum going by spending a few minutes each day using your technology. Not sure where to start? Here are four next steps to help you build daily habits with your solutions:

- [ ] 1. Create a lead engine solution (landing page, squeeze page or text code) to utilize in all of your marketing efforts.
- [ ] 2. Complete your content + blog worksheets and stick to the plans you create to provide value to your audience.
- [ ] 3. Use the automatically created assets within the listing kits to promote your listing during each phase of the listing life cycle.
- [ ] 4. Connect your professional social media accounts to Social to enhance your engagement with your followers.

COMPLETE AGENT DEVELOPMENT

Take your professional development into your own hands

Congratulations on completing Technology Foundations! Looking for more educational opportunities? Take your learning to the next level with the Complete Agent Development Program:

PROSPECTING + LEAD GENERATION CLASSES

- FSBO Boot Camp
- Repeat + Referral Boot Camp
- Open House Boot Camp
- Expired Boot Camp

LEAD CONVERSION CLASSES

- Buyer Conversion Boot Camp
- Listing Conversion Boot Camp
- Pricing Boot Camp

BUSINESS CLASSES

- Business Foundations Boot Camp
- Activities Management Boot Camp

Coming Soon!

- *Negotiation Boot Camp*

TECHNOLOGY CLASSES

- Technology Foundations Boot Camp

GLOSSARY

Important terms to know

MAX/Tech — The full collection of tech solutions available to RE/MAX affiliates.

MAX/Center — A destination for accessing solutions within the MAX/Tech suite. Includes additional, helpful features such as a URL Shortener, access to the RE/MAX Referral Platform and the Agent Office Portal.

- **MAX/Profile** — The profile that feeds broker and agent information, such as contact details, photo, bio, MLS IDs, service areas and more, into the RE/MAX database. Information here appears on national websites (remax.com + remax.ca) as well as office sites, agent sites and other MAX/Tech solutions.

RE/MAX Hustle — A simple, RE/MAX-exclusive video editing website that includes a wide range of video templates to help promote listings, agent offerings, recruitment efforts and more.

Photofy — A paid subscription that includes a robust library of RE/MAX-branded photo and video templates to help promote listings and open houses, celebrate upcoming holidays, and make meaningful connections with social media followers.

Folio — A virtual assistant that works in conjunction with an agents' Gmail or Outlook accounts to automatically sort emails by transaction. It will also create a timeline for each transaction to share with clients to keep everyone on track.

MAX/Tech powered by BoldTrail — A powerful platform that includes solutions for managing every aspect of a real estate business. Created in partnership with Inside Real Estate, this platform is RE/MAX-branded and includes access to additional solutions and features for no additional cost.

- **Behavioral Automation** — Automated actions triggered by a contact's behavior on an agent website to enhance engagement and follow-up.
- **Contact Record** — A detailed profile of a contact that includes personal information, interaction history, notes, quick links to add automations and more.
- **Contact Source** — Where the contact originated from. This is extremely helpful when tracking the success of marketing efforts.
- **Contact Status** — The current state of a contact within the client journey. These include Sphere, Prospect, New Lead, Active Lead, Client, Contract and Closed.
- **Contact Type** — The categorization of a contact based on their relationship. These types include Buyer, Seller, Renter, Vendor and Agent.
- **Dashboard** — The homepage of MAX/Tech powered by BoldTrail that highlights lead activity, upcoming tasks and calls.
- **DesignCenter** — A creative hub for designing listing marketing materials, such as flyers, social media posts and email templates.
- **Hashtag** — A label that can be added to any contact that allows a user to create curated contact lists, set certain automations and keep their database organized.

- **Landing Pages** — A customizable web page designed to capture a lead's contact information in exchange for an item of value such as a Buyer's Guide or information on an open house that do not reside within the website navigation.
- **ListingMachine** — A tool for automating the creation and distribution of listing marketing materials at every stage of the listing lifecycle.
- **Market Report** — Regular, automated reports that provide contacts with insights into local real estate market trends and statistics.
- **Pages** — A library of customizable templates available for you to create value driven content pages on your MAX/Tech website that have the ability to reside in the website navigation or not.
- **Playbooks** — Not sure where to start with MAX/Tech powered by BoldTrail? These pre-defined workflows help users get to know their new solutions and better understand how to implement them into their business strategies.
- **Present** — A presentation tool designed to create engaging, data-driven presentations for potential buyers and sellers.
- **PropertyBoost** — An advertising tool that promotes property listings through targeted online ads to generate more leads and visibility.
- **Search Alert** — Automated notifications sent to contacts about new property listings that match their search criteria.
- **Smart Assistant** — An AI-powered assistant that helps write emails, texts and call scripts on a users' behalf.
- **Smart Campaigns** — Next-level drip campaigns that include traditional emails and texts as well as extra actions like call reminders, tasks, status changes and more.
- **Smart CRM** — MAX/Tech powered by BoldTrail's customer relationship management system that uses automation to streamline interactions and follow-ups with leads and clients.
- **Smart Number** — A virtual office phone number that can track and route calls and texts to the proper agent.
- **Squeeze Pages** — Highly targeted web pages designed to capture lead information by offering something of value in return like information about a single property, multiple properties, an open house or a local market report that do not reside within the website navigation.
- **Text Codes** — Short codes that leads can text to receive information about something, which also captures their contact details for follow-up.

RE/MAX University — RE/MAX's exclusive learning platform, full of educational opportunities for all RE/MAX affiliates. Access on-demand courses including the Technology Foundations Boot Camp, Complete Agent Development Boot Camps and peer-interview videos; register for live learning sessions; and more.

"People assume everyone wants to reach their potential and be the best they can be. I've concluded most people only want to be average and do just enough to get by!"

You are not the typical agent.

You are on the pathway to Mastery.