RE/MAX

BROKER/OWNER

TECH PLANNER



Master MAXTech® and streamline your brokerage's operations.

WELCOME TO THE BROKER/OWNER TECH PLANNER

This digital planner is your go-to guide for exploring and using the full MAXTech suite — a collection of powerful technology solutions designed to support your and your agents' businesses.

Whether you're new to these solutions or looking to help level up your brokerage's tech game, this resource breaks each one into manageable, actionable steps.

How to use this planner:

- Browse the table of contents on the next page and click the solution you want to explore.
- Read the overview to understand what the solution does and how it supports your business.
- Complete the quick-start tasks listed on that page to begin using the solution right away.
- Click "Return to Table of Contents" at any time to return to the beginning.

You don't need to finish this all at once. Tackle one page at a time and build sustainable habits with each technology as you go.

Ready to get started? Pick a solution on the next page, dive in and let the tech do the heavy lifting.

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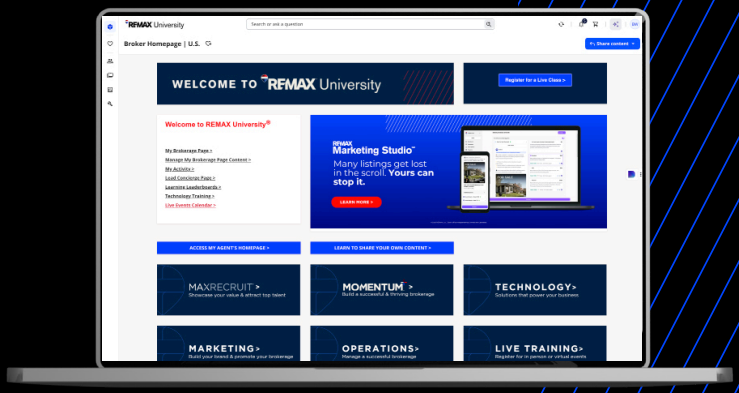
RE/MAX + Canva

RE/MAX HUSTLE

REMAX University

REMAX provides you continuous education and support to help you and your agents advance in your real estate careers.





1 DISCOVER REMAX UNIVERSITY

REMAX University is your home for any continuing education in real estate, technology and business support. It houses certifications and designations for your agents, courses focused on brokerage growth, and access to nationally recognized real estate and productivity coaches. In this planner, you'll also find links to trainings to help you learn how to use our technology solutions, so take this opportunity to learn more about the platform before you get started!

- ☐ Access REMAX University via SkyView.
- ☐ Download the REMAX University app from your mobile device's app store.
- ☐ Explore REMAX University via the guided walkthrough: **Getting Started in REMAX University as a Broker course >>**

2 UPLOAD YOUR BROKERAGE CONTENT

Your brokerage has three dedicated channels in RU where you can share content that is only visible to agents at your brokerage. Make your own educational content searchable alongside REMAX-provided learning opportunities!

- ☐ **Learn how to add training, marketing and brokerage resources to RU >>**
- ☐ Identify at least 3 existing trainings and helpful resources to upload to your channels.

3 REGISTER FOR UPCOMING LIVE EDUCATIONS SESSIONS

Take this opportunity to invest in your office growth so you can stay ahead of market shifts, adapt to new technology and deliver more value to your agents.

- ☐ Register for an upcoming **Learning & Development Session >>** such as an Unstoppable Growth call or a monthly technology workshop.

CUSTOMER SUPPORT

Need help or have a question? Don't hesitate to reach out to Customer Support.

TEXT OR CALL
1.888.398.7171

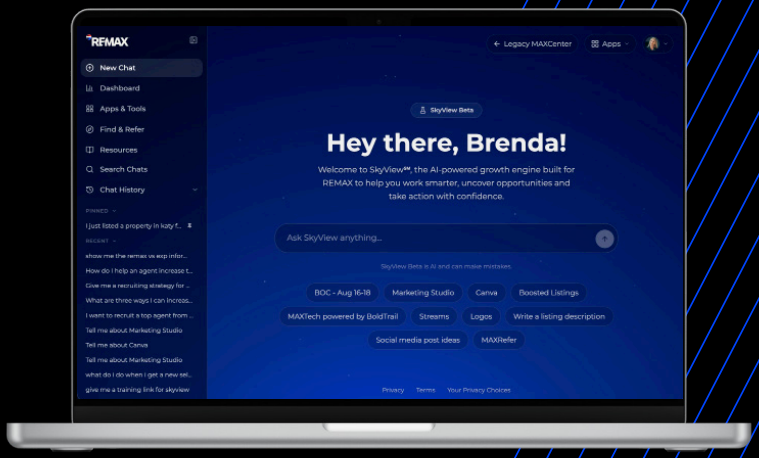
EMAIL
customersupport@remax.com

LIVE CHAT
Visit the Customer Support tile in SkyView

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SkyView℠

SkyView is your starting point for accessing all the tools and resources REMAX® offers, including your personal and office REMAX Profile. SkyView is also your personalized AI assistant, ready to help you find the information you need to grow your business, recruit new agents and retain your existing ones!



1 SET UP YOUR REMAX PROFILE

As a REMAX broker/owner, your profile includes both personal sections and sections for your office. Much of the information included here will appear on remax.ca as well as your office and personal websites. It also feed information to other solutions discussed in this planner, making this a critical first step.

PERSONAL REMAX PROFILE

- ☐ Upload a current and high-resolution headshot.
- ☐ Complete each section of your profile, adding your personal and professional details.
- ☐ Confirm your MLS ID and service areas are correct.

OFFICE REMAX PROFILE

- ☐ Complete your office profile, specifically your office bio which will appear on your BoldTrail office website as well as remax.ca. This should include an office logo and photo.
- ☐ Set up your MLS ID for your office.
- ☐ Update your Office Lead Area polygon to determine which remax.ca leads flow to your office.

2 DISCOVER CORE APPS

Visit the Apps & Tools section and locate the following solutions:

Learning & Education
Platform: MAXTech® powered by BoldTrail
Canada Agent Broker Hub
Marketing Studio
Agent Office Portal
Customer Support

3 ASK SKYVIEW

Unlike generic AI, SkyView understands REMAX terminology, tools and workflows that help you grow, promote and operate your business more efficiently. Save time by asking SkyView! Try the Chat feature and enter the following prompts:

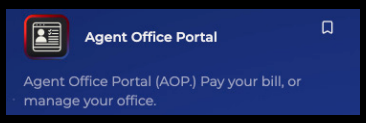
- ☐ Help me create a recruiting plan.
- ☐ Show me my recruiting tools.
- ☐ What makes REMAX different from competitors?
- ☐ How do I onboard a new agent?

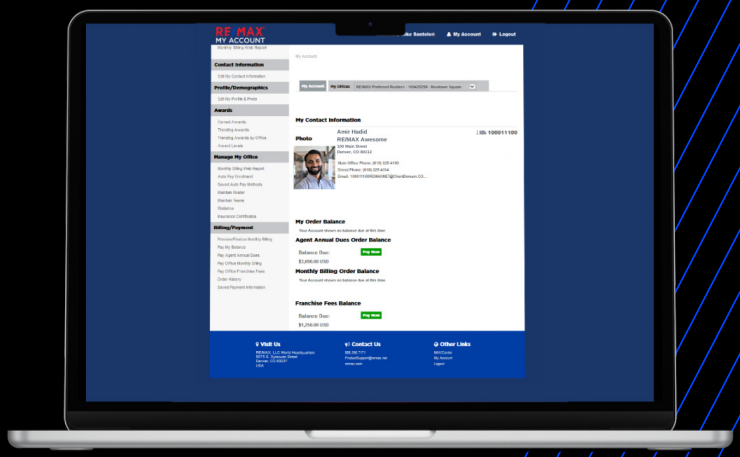
Access training resources on REMAX University: rem.ax/SkyView

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AGENT OFFICE PORTAL

The Agent Office Portal is your destination for managing the organizational and financial aspects of your brokerage. You'll use this system to maintain your office roster, update transactional information for your office and pay any personal or office bills and franchise fees.





1 GET TO KNOW YOUR PROFILE + ROSTERS

The Agent Office Portal allows you to keep both your personal REMAX information and office information up-to-date. Use this opportunity to review your profile and see what information can be updated. Then, learn how to maintain your agent, staff and team rosters.

- ☐ Watch the **Navigating the Agent Office Portal video >>**
- ☐ Explore your profile to see what information is included.
- ☐ Take the **Maintaining Your Office Roster in the Agent Office Portal Course >>**
- ☐ Ensure your office rosters are up to date.

2 SET UP AUTO-PAY

Life can be hectic! Leverage the power of auto-pay to seamlessly and automatically pay your office bill in the Agent Office Portal each month.

- ☐ Watch the **Paying Your Office Bill + Franchise Fees in the Agent Office Portal video >>**

3 MANAGE YOUR OFFICE STATISTICS

The Agent Office Portal gives you control over the organizational aspects of your business. Within the Statistics section of the platform, you can add individual transactions and pull reports to see how your agents are performing on a monthly and annual basis.

- ☐ Take the **Uploading Transactions + Accessing Statistics course >>**
- ☐ Download the Transaction Template and save it in an easily accessible place.
- ☐ Download an Affiliate YTD Verification Report, a Team YTD Verification Report and an Office YTD Verification Report. Review the information that is provided in these reports so you can better understand how to leverage them for your business. Note: These reports only show transactions that have already been added to the Agent Office Portal.

4 DISCOVER REMAX AWARDS

The Awards section of your Agent Office Portal platform shows the REMAX awards history for each of your agents as well as how they are trending for future awards.

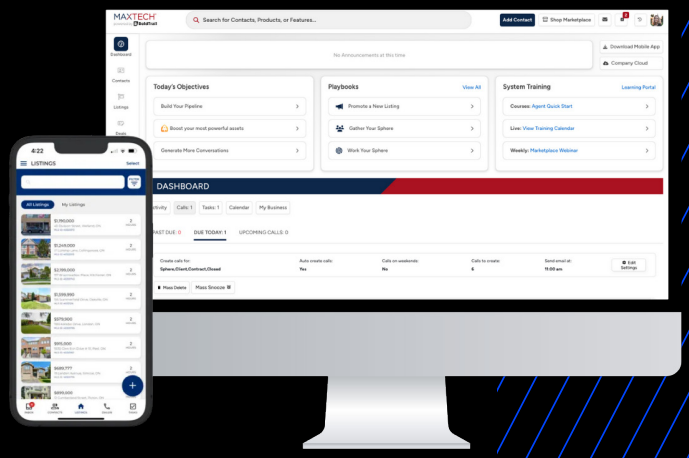
- ☐ Review the **How to View Your Agents' Awards Standing Guide >>**

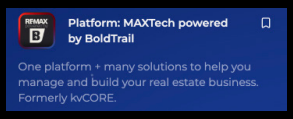
Access training resources on REMAX University: **rem.ax/AOP**

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MAXTECH®
powered by BoldTrail

A robust platform offering award-winning websites, lead management, Smart CRM, automated campaigns, transaction integration, business intelligence and more.





1 GET STARTED

Once your office is ready to onboard to MAXTech powered by BoldTrail, you'll receive an email from Inside Real Estate at no-reply@boldtrail.com with details.

- ☐ Sign the BoldTrail Platform Agreement (KPA).
- ☐ Complete the Set-up Wizard.

2 COMPLETE THE ADMIN LAUNCH CHECKLIST

Begin your onboarding journey by completing the steps in the in-platform Admin Launch Checklist that is accessible when you login.

- ☐ Gain MLS approval.
- ☐ Drive agent results.
- ☐ Review your website and prepare for launch.
- ☐ Understand platform configuration.
- ☐ Schedule and complete the launch call.
- ☐ Invite your agents.

3 COMPLETE THE ADMIN QUICK START COURSE

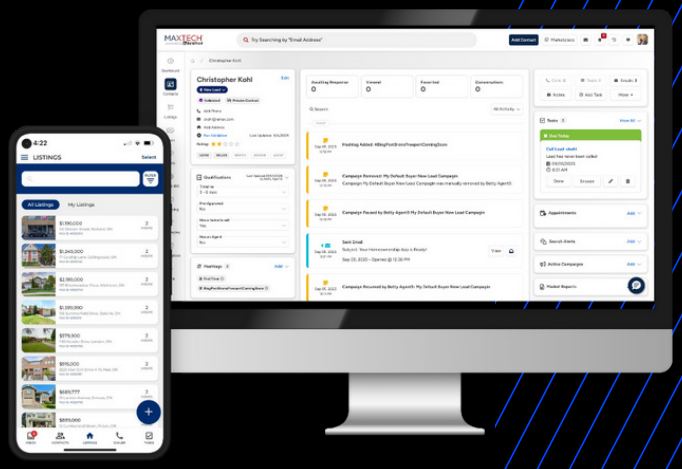
Get a jump start on MAXTech powered by BoldTrail. Learn how to configure your MAXTech powered by BoldTrail account, become familiar with the platform's solutions and learn strategies for encouraging adoption of the platform with your agents.

- ☐ Complete Inside Real Estate's **Admin Quick Start course >>** accessible via the in-platform Learning Portal to walk through key aspects of your new platform.

MAXTECH®
powered by BoldTrail

SMART CRM

Your MAXTech powered by BoldTrail Smart CRM is your database of contacts and the starting point for your recruiting strategy. Add your target prospect list, add important information about each agent, sort by filters and assign tasks to stay on track.



1 ADD YOUR CONTACTS TO YOUR NEW DATABASE

The first step to taking advantage of your new Smart CRM is uploading your existing contacts to the platform. There are multiple ways to do this, depending on how you currently store your contacts, including a manual bulk upload using a .csv file, connecting a Google account to pull in your Gmail contacts or taking advantage of Inside Real Estate's free Lead Import Service.

- ☐ Read the **Importing & Exporting Your Contacts article >>** to learn how to import contacts.
- ☐ Successfully import your contacts using whatever method you choose.

2 ORGANIZE YOUR CONTACTS

Your Smart CRM allows you to organize your contacts in a way that works best for you and your unique business. Each of your contacts will have a Contact Record within your Smart CRM that includes a variety of organizational features to help you stay on track and connected.

- ☐ Read the **Contact Record Overview article >>** to learn how to navigate Contact Records.
- ☐ Make sure each contact's information is up to date. If not, reach out and check in!
- ☐ Update each contact's lead type and status. For example, if you have a recruit you are actively pursuing, change their lead type to 'Agent' and their status to 'Active Lead'.
- ☐ Add relevant hashtags to better categorize your contacts. For example, if you have a contact that is a recruit, consider adding their current company or production level, experience level, hobbies and more.

3 ADD ADDITIONAL INFORMATION

Take your Contact Records to the next level by adding additional information to the Profile Details section. Add details about their families, their birth dates and other key information you want to remember for that contact.

- ☐ Add your contacts' birth dates.
- ☐ If they are a potential recruit, add any necessary information including their current brokerage, performance metrics and opportunities that the brokerage could support.
- ☐ Add any familial details such as Spouse/Partner names and contact information.

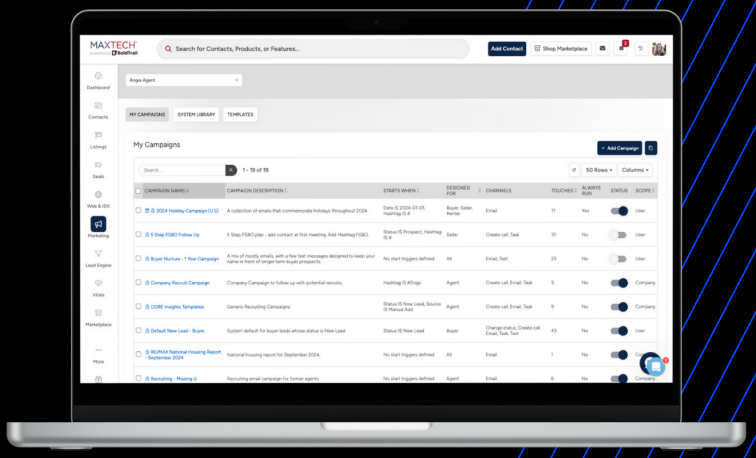
Access training resources on REMAX University: **rem.ax/MAXTechBoldTrail**

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MAXTECH®
powered by BoldTrail

SMART CAMPAIGNS

Smart Campaigns are designed to keep you in touch and top of mind with your prospects and recruits. Use a default Smart Campaign provided by MAXTech powered by BoldTrail, edit one or even build your own! These Smart Campaigns will send messages to your contacts or remind you of important tasks.



1 LEARN MORE ABOUT SMART CAMPAIGNS

Before you can begin leveraging the power of Smart Campaigns, it is helpful to understand what they are and how they work.

- ☐ Read the **Complete Guide to Smart Campaigns article >>** to learn more about using Smart Campaigns to streamline different aspects of your business.

2 REVIEW PRE-EXISTING SMART CAMPAIGNS

Both you and your agents have access to a wide range of pre-built Smart Campaigns that you can begin leveraging right away! It is highly recommended that you take time to review the default campaigns included so that you understand how they work and what triggers them.

- ☐ Review your agents' default Smart Campaigns.
- ☐ Review your pre-existing recruiting Smart Campaigns.
- ☐ Identify the starting triggers for these recruiting campaigns so you can include them in your recruiting efforts.

3 CREATE CUSTOM SMART CAMPAIGNS FOR YOUR AGENTS

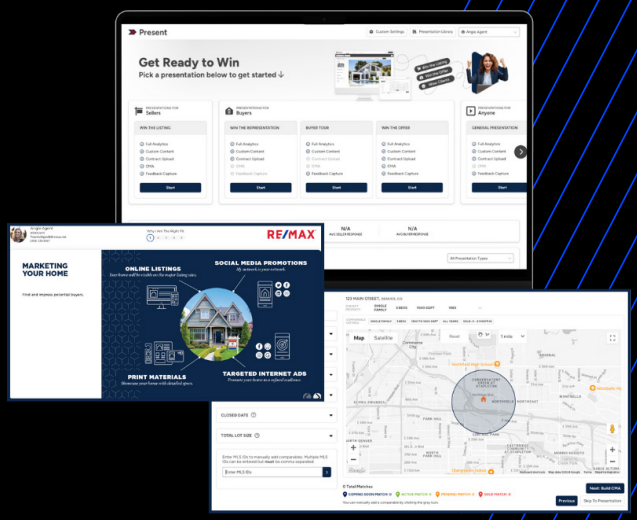
As a MAXTech powered by BoldTrail admin, you have the power to build Smart Campaigns and send them to your agents to use in their own businesses.

- ☐ Create a new Smart Campaign. To share it with your whole brokerage, choose Company as the campaign scope.
- ☐ Build your own, personalized campaign. Be sure to add your own branding and local market information to truly make it yours.
- ☐ Let your agents know about this campaign and encourage them to use it. If you would like to turn this campaign on by default for all of your agents, you can do that as well.

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Present

Present is your agents' key to truly impressing their prospects and clients! With this solution, agents can create an informative Comparative Market Analysis (CMA), listing presentations, buyer presentations and even buyer tours they can use during those busy showing days. And, as an admin, you can add value by creating brokerage-specific content.



1 GET STARTED WITH PRESENT

Before you dive in and start creating CMAs and presentations with Present, there are a few small things you should do first:

- ☐ Read the **Present General FAQs article >>** to learn more about what features are available.
- ☐ Personalize your brokerage's presentations in Present's Customization Settings section. Choose which colours, fonts and logos should automatically be used in agents' presentations to create consistency across your brokerage.

2 EXPLORE PRESENT

Present gives your agents the solutions they need to wow potential sellers and buyers through engaging CMAs and fully customized, beautifully branded presentations with real-time activity tracking. Use this opportunity to get to know the platform better so you can better support them.

- ☐ Read the **Present: How to Create a Listing Presentation article >>**
- ☐ Create a CMA.
- ☐ Create a listing presentation.
- ☐ Create a buyer presentation.
- ☐ Create a buyer tour.

3 CREATE CUSTOM SLIDES FOR YOUR AGENTS

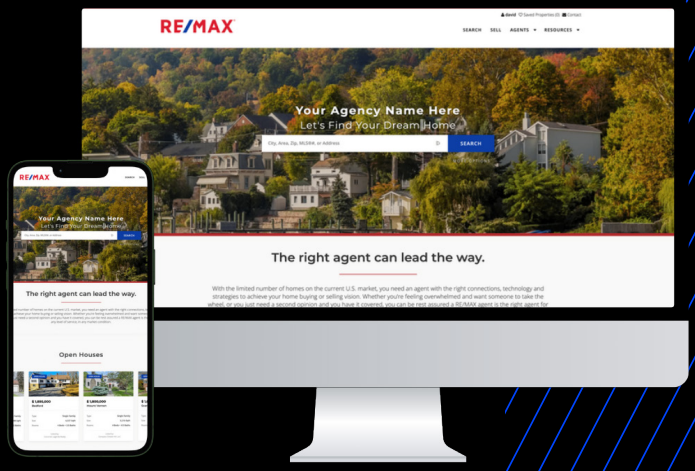
As a MAXTech powered by BoldTrail admin, you have the ability to create custom slides and add them to your brokerage's Presentation Library for agents to use in their presentations.

- ☐ Use the Create a Slide tool to build slides for agents to use. Try to personalize these slides to your unique brokerage and market. If you have slides that are already saved to your computer as images or PDFs, you can upload those as well.
- ☐ Use the slide setting options to add tags to your custom slide, add it to the proper category and ensure it is permissioned to your whole company.
- ☐ As you are building your own slides, consider how you can use this as a recruiting solution to create presentations for potential recruits with real-time tracking capabilities.

MAXTECH®
powered by BoldTrail

WEB & IDX

Your MAXTech powered by BoldTrail office website is out of the box, beautifully branded and ready to go on day one! This website allows you to seamlessly highlight your brokerage and listings, add value to your audience and capture new leads. Keep your office website as-is or customize it to better fit your brokerage's needs.



1 LEARN MORE ABOUT YOUR OFFICE WEBSITE

While your MAXTech powered by BoldTrail website is ready to go on day one, there are still a few things you can do to truly customize it to your brand and business. Take a moment to review your website's capabilities before you begin making it your own.

- ☐ Read the **Editing Your Website article >>**

2 CHANGE YOUR WEBSITE APPEARANCE

When customizing your website, you can change several things to help build your brand directly into your website, including the text, header image, widget layout, navigation and more.

- ☐ Add your own header image.
- ☐ Update the home page widget layout to one that works best for your business goals.
- ☐ Update the listing carousels to showcase the types of listings you want to promote.
- ☐ Include testimonials from past clients that showcase your value proposition.

3 UPDATE YOUR SERVICE AREA PAGES

Local area pages are a great way to improve your search engine ranking and offer value to your audience. Easily create these pages using the information provided by your MLS.

- ☐ Add as many service areas to your website as you like, but keep in mind that an area name must be included in your MLS in order for a page to be created.
- ☐ Customize each page by including a description of each area and by adding additional, relevant content such as a video of the area, ideas on things to do, your own photos and more.

4 CREATE NEW PAGES

You can create multiple custom web pages that engage and inform your audience. These pages should provide value to local consumers and consistently drive traffic to your website.

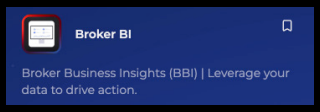
- ☐ Create two new pages for your website. Ideas for these pages could be buyer or seller guides, local event roundups, information on the local real estate market and more.
- ☐ Review the Join REMAX custom page that is automatically added to your website to help with your recruiting efforts.

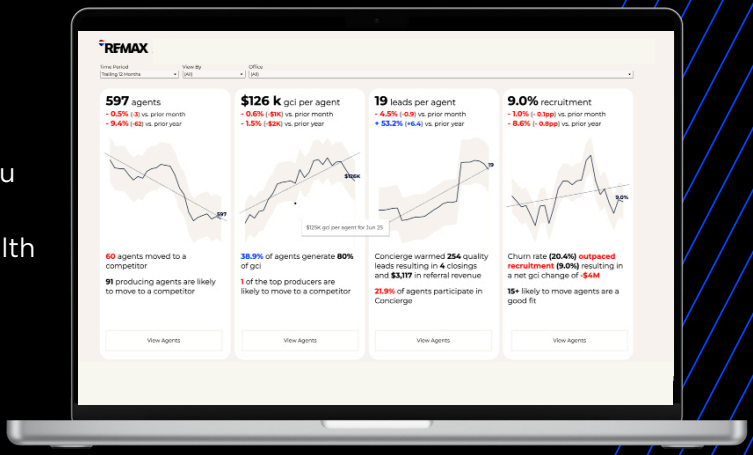
Access training resources on REMAX University: **rem.ax/MAXTechBoldTrail**

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BROKER BI DASHBOARD

Brokerage Business Insights (BBI) gives you a quick view of the health of your brokerage so you can make informed decisions around retention, productivity, recruiting, and growth. Use the Health Scorecard each month to identify opportunities, prioritize conversations and take action.





1 GET STARTED WITH THE BROKER BI DASHBOARD

- [ ] Watch an overview video to learn more: **Boost Your Brokerage Growth with Broker BI >>**
- [ ] Access the dashboard via SkyView and review the 4 key areas: Agent Count Movement, GCI Performance, Leads per Agent, and Recruitment & Churn.
- [ ] Review the report monthly, act on the insights and track progress over time.

2 REVIEW YOUR BROKERAGE HEALTH

- [ ] Aftering reviewing each section of the report, compare current trends against prior months and last year to determine if your brokerage is growing, stable or declining.
- [ ] Download and share results with your leadership team to align on priorities.
- [ ] Identify the one or two metrics that need the most attention this month and make them your leadership focus.

3 RETAIN AND GROW YOUR AGENT BASE

- [ ] Review the Flight Risk list to identify agents who may be at risk of leaving and create a plan of action for how to address these risks.
- [ ] Check your top-producing agents in the GCI section and prioritize retention conversations with high-value contributors.
- [ ] Identify good-fit agents from other brokerages that are most likely to move and align with your recruiting goals. Then make a plan to reach out with something of value.

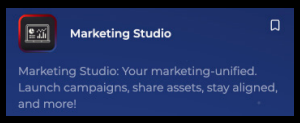
4 INCREASE PRODUCTIVITY AND LEAD ADOPTION

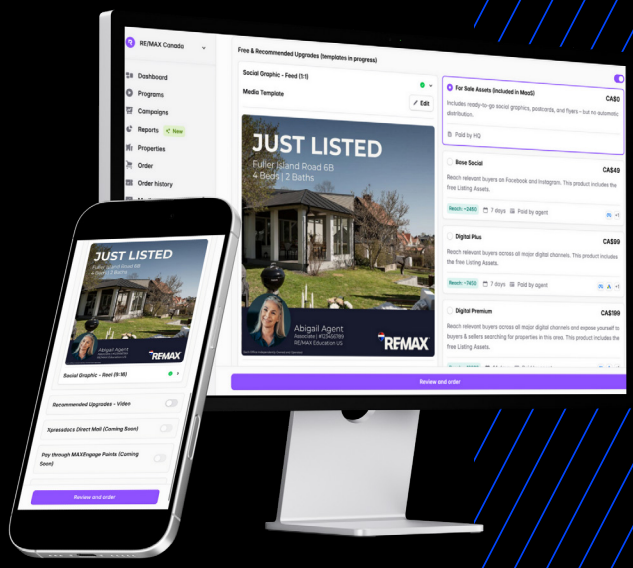
- [ ] Review Leads per Agent to understand lead sources and agent participation in MAXTech Lead Concierge.
- [ ] Identify agents successfully using MAXTech Lead Concierge and leverage their success stories with the broader office.
- [ ] Find agents who have not opted in and help them activate the concierge program, lead-generation tools other and technology resources.

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REMAX Marketing Studio℠

Marketing Studio is your one-stop-shop for your marketing needs, giving you more time back to attract agents, win listings and build a strong, lasting business. This evolving solution offers marketing assets and campaigns powered by AI and REMAX data to deliver the best results.





1 GETTING STARTED

As a member of REMAX, you already have access to the Marketing Studio platform, no need to sign up or take any additional actions to get started.

- ☐ **Watch this video to learn more about Marketing Studio for Recruiting >>**

2 PROMOTE YOUR OFFICE TO RECRUITS

Attract and grow your office with recruiting campaigns! Start leveraging pre-designed assets and recruit campaigns into your regular marketing routine.

- ☐ Download complimentary assets or launch paid ad recruit campaigns across Meta (Facebook & Instagram), Google Display Network and Google Search for an additional cost.
- ☐ Upload your recruiting list to create a custom audience to target for your ads.
- ☐ View user activity, campaign metrics and launch your own campaigns.

3 SETUP AD AUTOMATION

Automating your recruiting ads in Marketing Studio allows you to maintain a consistent presence for your brokerage without manually launching every ad.

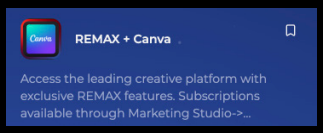
- ☐ From the Marketing Studio Subscription Hub, choose the Automate Office Recruiting option to begin promoting your office on a monthly basis.
- ☐ Select your marketing tier and setup your payment information. You'll receive an email 24-hours prior and can use that time to make changes or cancel if you choose.

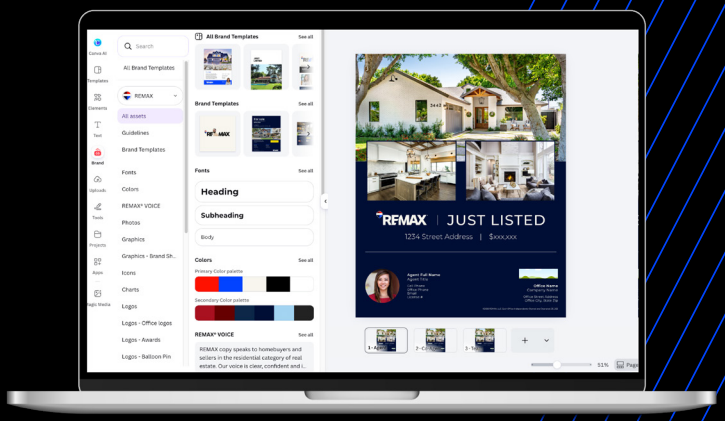
Access training resources on REMAX University: **rem.ax/REMAXMarketingStudio**

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REMAX + Canva

REMAX + Canva brings powerful design tools together with the trusted REMAX brand. With pre-built templates and MLS integration, you can create polished, on-brand marketing materials with ease by connecting Canva directly to REMAX data and systems.





1 EXPLORE BRAND KIT & TEMPLATES

Brand kits are available inside the REMAX + Canva experience, making it easier than ever to keep your designs on brand and looking professional.

- ☐ Before you begin, you first need to purchase a subscription. For new and existing users, watch the **Navigating Your REMAX Canva Pro Account course >>**
- ☐ Go to the 'Brand' section in Canva to familiarize yourself with the approved logos, fonts and the official brand colours.

2 SETUP CANVA FOR YOUR OFFICE

Your brokerage has even more options that provide value to your office, helping you drive adoption and providing the opportunity to personalize the experience to your market.

- ☐ Bulk purchase 10+ licenses to receive a discounted price, making it easier and more affordable to offer premium marketing tools at your office. Contact your Global Service Consultant for more details.
- ☐ Create your own custom design templates for your specific office or team and share them across your roster.

3 CREATE A LISTING GRAPHIC

Marketing a listing for your office has never been easier. With REMAX + Canva, you can access pre-designed templates and use the MLS connection to easily pull listing details into your design. Broker/owners and staff will be able to see all listings for your office.

- ☐ Open a REMAX "Just Listed" template and make sure your MLS is connected to Canva by clicking the REMAX Data App icon at the bottom of the lefthand menu.
- ☐ Use the MLS integration to pull in details for one of your current office listings. Drag and drop photos, listing details and the agent contact information to update the design.

4 CREATE AN AD WITH MARKETING STUDIO

Getting your Canva designs into Marketing Studio is a quick process that bridges your creative work with your advertising tools. Follow these steps to send it to Marketing Studio:

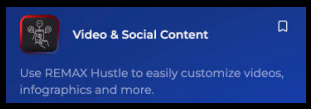
- ☐ Once your design is ready, use the Share button within Canva and select REMAX Marketing Studio. This hands your design off to the ad platform without needing to reformat or download files.
- ☐ Go to Marketing Studio, pick your ad package, confirm your targeting and budget, and launch your ad.

Access training resources on REMAX University: **rem.ax/Canva**

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RE/MAX HUSTLE

Capture high-quality recruiting leads and promote your agents by sharing a personalized video that highlights the value of the REMAX brand and your brokerage's unique offerings.





1 DISCOVER REMAX HUSTLE

- ☐ Take the **Getting Started With REMAX Hustle course >>**
- ☐ Take the **Leveraging Videos + Graphics for Recruiting course >>**

2 EXPLORE THE PRE-MADE VIDEO TEMPLATES

- ☐ Review the library of pre-made video templates designed to promote agents' brands and even show support to your community.
- ☐ Explore the REMAX Canadian Commercial Campaigns that can be easily personalized. Don't miss the many recruiting-focused videos you can share online and with potential recruits!
- ☐ Click into a template and begin adding customizations like your name and contact information.
- ☐ Once you finish customizing your video, download the video to your computer to post on social media, share on your website and more.

3 BUILD A VIDEO FROM SCRATCH

Don't see a video template that fits your specific business needs? The Hustle Video Editor allows you to create a video with your own photos and video clips. Add music, stickers and more to create a video that shows off your community, offers an inside look into your office, highlights your agents' expertise or send a personal message to a prospect.

- ☐ Watch the **Getting Started With the REMAX Hustle Video Editor video >>**

4 CREATE CUSTOM GRAPHICS

REMAX Hustle offers more than just videos. Use this handy solution to create custom graphics to share on social media that celebrate your agents' accomplishments.

- ☐ Create a Hustlegraphic that outlines an agent's career wins from the past year.
- ☐ Post a Digital Welcome Mat to welcome any new agents.



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