Broker Technology Planner

Canadian Edition

Master RE/MAX® technology.

Develop effective work habits.

Form professional best practices.

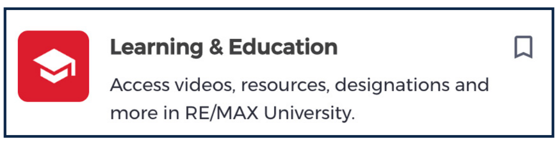
Unstoppable Starts Here

This planner provides bite-sized activities you can schedule throughout your week.

To get started, follow the steps below:

1. Click on an application on the right.

2. Review the tasks and find the proper application tile within MAX/Center to start tackling your list.



3. Access the Broker Technology Planner course on RE/MAX University at **rem.ax/CANBrokerTechPlanner** to easily view all of the videos linked in this planner.

MAXCENTER®

Agent Office Portal

MAXRECRUIT

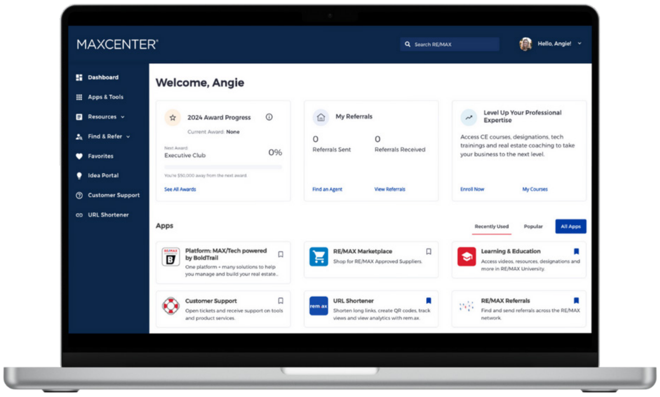
MAXTECH℠ powered by BoldTrail

folio

Photofy

RE/MAX® HUSTLE

RE/MAX university® & customer support



MAXCENTER®

MAX/Center® is your starting point for accessing RE/MAX solutions and resources. This is also home to your personal MAX/Profile and Office MAX/Profile, where critical information related to your online brand, MLS and service areas are configured. Every broker/owner should follow these exercises at least once.

1 SET UP YOUR MAX/PROFILE

As a RE/MAX broker/owner, your MAX/Profile includes both personal sections and sections for your office. Much of the information included here will appear on remax.com/remax.ca as well as your office and personal websites. It will also feed information to many of the other solutions discussed in this planner.

PERSONAL MAX/PROFILE

- ☐ Take the **Setting Up + Personalizing Your Agent MAX/Profile course >**
- ☐ Upload a current and high-resolution headshot.
- ☐ Complete each section of your profile.
- ☐ Confirm your MLS ID and Service Areas are correct.

OFFICE MAX/PROFILE

- ☐ Take the **Setting Up + Personalizing Your Office MAX/Profile course >**
- ☐ Complete your office profile — specifically your office bio, which will appear on your office website as well as remax.com/remax.ca.
- ☐ Upload a high-resolution office logo and photo of your office.
- ☐ Set up your MLS ID for your office.
- ☐ Update your Office Lead Area polygon to determine which remax.com/remax.ca leads flow to your agents.

2 DISCOVER CORE APPS

Visit the Apps & Tools section and locate the following apps, which provide valuable information and productivity solutions.

- **MAX/Recruit**
- **Platform: MAX/Tech powered by BoldTrail**
- **Learning & Education**
- **Marketing Portal**
- **Video & Social Content**
- **RE/MAX Marketplace**
- **RE/MAX Referrals**
- **Children's MIracle Network Program (CAN)**
- **Agent Office Portal**

3 DISCOVER REM.AX URLS

Learn how to create easy to remember links with the **URL Shortener >**

- ☐ Shorten lengthy URLs from your office or team website, recruiting pages or other materials.
- ☐ Customize your links to make them more memorable, for example rem.ax/joinREMAXAdvantage.

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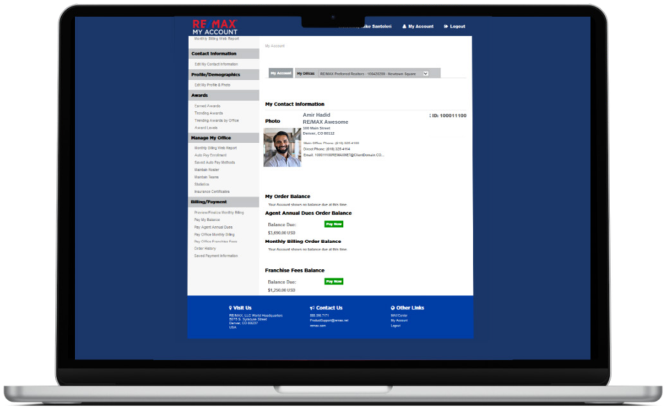

Agent Office Portal

Access your personal profile, contact and billing information in My Account.

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 RE/MAX 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. Keep in mind that these reports will only show transactions that have already been added to the Agent Office Portal. Review the kinds of information that is provided in these reports so you can better understand how to leverage them for your business.

4 DISCOVER RE/MAX AWARDS

The Awards section of your Agent Office Portal platform shows the RE/MAX 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 >**
- ☐ Explore the different RE/MAX Award levels.

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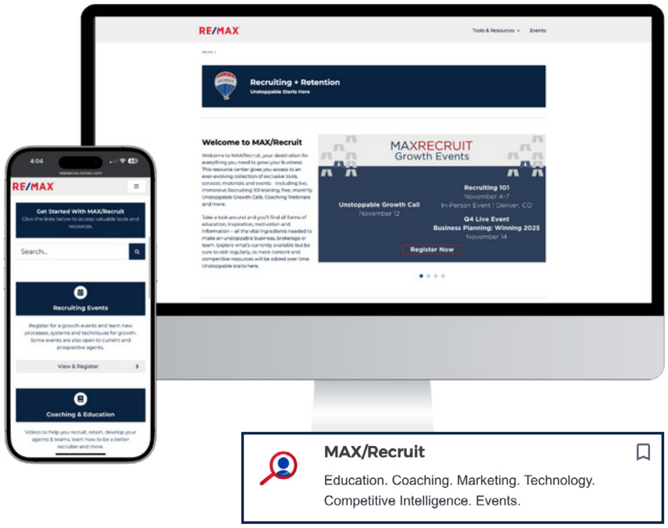

MAXRECRUIT

MAX/Recruit is the most comprehensive growth program in RE/MAX history. This resource center gives you access to an ever-evolving collection of exclusive solutions, services, materials and events.

1 EXPLORE MAX/RECRUIT

On MAX/Recruit, you'll find education, inspiration, motivation and information all focused on one thing: the growth of your business. Take this time to start exploring these resources, bookmarking your favorites and thinking about your own recruiting plan.

ATTEND UPCOMING RECRUITING EVENTS

- ☐ Register for upcoming growth events including the Unstoppable Growth Calls, Coaching Webinars, Group Coaching, Recruiting 101, 1-on-1 Coaching and other specialty events.
- ☐ See what recruiting and retention events you are able to invite agents and prospects to.
- ☐ Promote the next Build Your Business with RE/MAX event to prospects.

LEARN HOW TO BE A BETTER RECRUITER

- ☐ Learn from peers and MAX/Recruit coaches through on-demand videos.
- ☐ Watch the latest **Coaching Webinar >**

CONNECT WITH OTHER TOP RECRUITERS

- ☐ Join the **RE/MAX Growth Masters Facebook Group >** to connect with broker/owners from around the world.

LEVERAGE MARKETING + TECHNOLOGY WITH RECRUITS >

- ☐ Download consistently updated R + R marketing materials, videos, presentations and more.
- ☐ Download the **Build Your Business Recruiting Presentation >**

RECRUIT AGAINST THE COMPETITION

- ☐ Review important Competitive Intelligence information.
- ☐ Download the **Value Prop Comparison Checklist >** to share ahead of recruiting conversations.

GROW THROUGH MERGERS AND ACQUISITIONS

- ☐ View the resources and materials available to see how other RE/MAX broker/owners have grown through mergers and acquisitions.

2 CREATE A RECRUITING PLAN

Now that you've explored MAX/Recruit and begun thinking about your own recruiting plan, it's time to get down to business.

- ☐ Partner with your Franchise Development Consultant (FDC) to identify which areas of recruiting you want to focus on.

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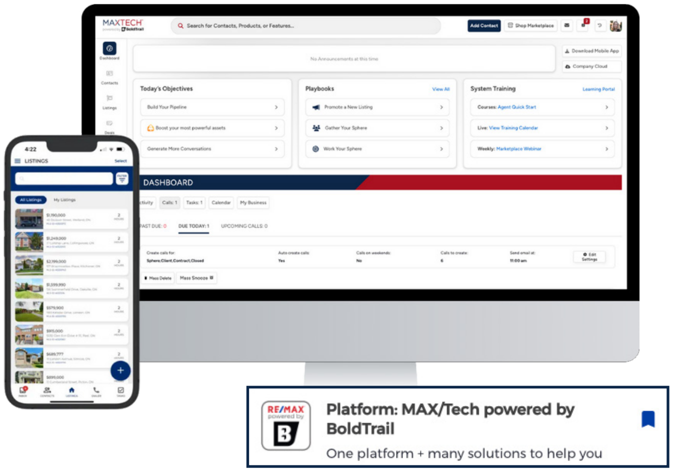

MAXTECH[SM]

powered by BoldTrail

RE/MAX has partnered with Inside Real Estate to bring you a robust platform offering award-winning agent/team/office websites, a recruiting page, lead management, Smart CRM, drip campaigns, marketing materials and more.

1 GET STARTED

Once your office is ready to onboard to MAX/Tech powered by BoldTrail, you'll receive an email from Inside Real Estate at **no-reply@kvcore.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.

- ☐ 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 MAX/Tech powered by BoldTrail with this Quick Start course. You'll learn how to configure your MAX/Tech powered by BoldTrail account for success, become familiar with the platform's solutions and learn strategies for encouraging adoption of the platform with your

- ☐ 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.

4 SUPPORT + RESOURCES

Have additional questions? Get the help you need when you need it using the following resources once you gain access to the platform.

- ☐ Connect with the Inside Real Estate support team via Live Chat inside the MAX/Tech powered by BoldTrail platform (Mon-Fri from 7:00am-5:00pm PT).
- ☐ Access **help articles >** or the **Inside Real Estate Learning Portal >** for guided tutorials of getting your solutions setup for success.
- ☐ Register for **live technology webinars >**

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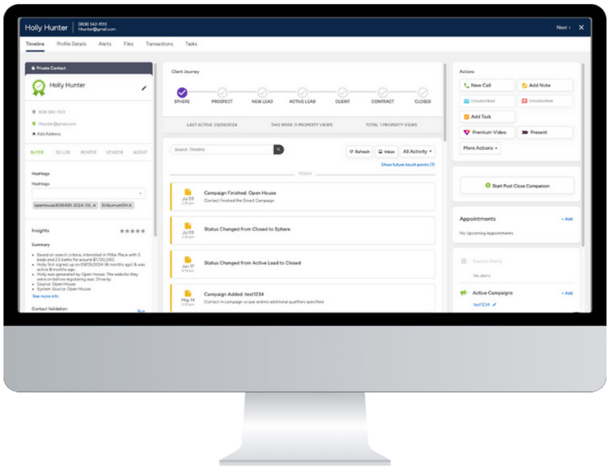

MAXTECH℠ powered by BoldTrail

Smart CRM

Your MAX/Tech powered by BoldTrail Smart CRM is your database of contacts and the starting point for your recruiting strategy. Here you can add your target prospect list, add important information about each agent, sort by filters and assign tasks to keep yourself 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 and prospect lists 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 your 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. This is a great opportunity to 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 they are a recruit consider adding their current company or production level, experience level, hobbies, things you want to remember about them and more.

3 ADD ADDITIONAL INFORMATION

Take your Contact Records to the next level by adding additional information to the Profile Details section. Here, you can add details around conversations you've had with your agents or potential recruits to track notes on how you can provide value and identify what they bring to your business!

- ☐ 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.

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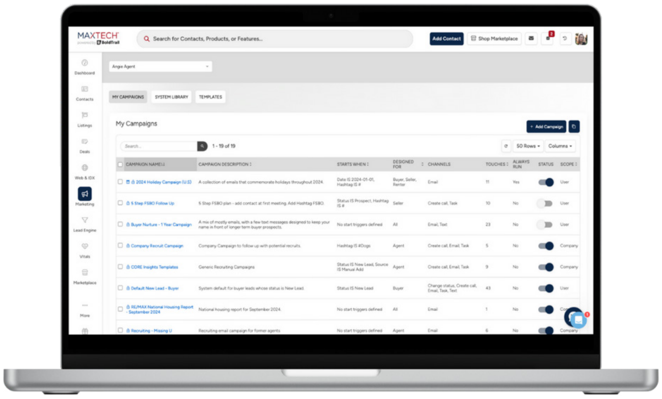

Smart Campaigns

Smart Campaigns are designed to keep you in touch and top of mind with your prospects and recruits. Utilize a default Smart Campaign provided by MAX/Tech 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 utilizing Smart Campaigns to automate 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 in both your and your agents' platform, so you can better understand how they work.

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

3 CREATE CUSTOM SMART CAMPAIGNS FOR YOUR AGENTS

As a MAX/Tech powered by BoldTrail admin, you have the power to build Smart Campaigns and send them down to your agents to utilize in their own businesses.

- [ ] Create a new Smart Campaign. To share it with your whole brokerage, you'll want to 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 in their businesses. 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 your own, brokerage-specific content.

1 GET STARTED WITH PRESENT

Before you dive into Present, there are a few small things you should do first:

- ☐ Read the **Present General FAQs article >** to learn more about what your agents can do with Present.
- ☐ Personalize your brokerage's presentations in Present's Customization Settings section. Choose which colors, 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 your agents in the future.

- ☐ 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 MAX/Tech 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 within Present to build slides for your 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 is as a recruiting solution to create presentations for potential recruits with real-time tracking capabilities.

Access resources to help you take a deeper dive >

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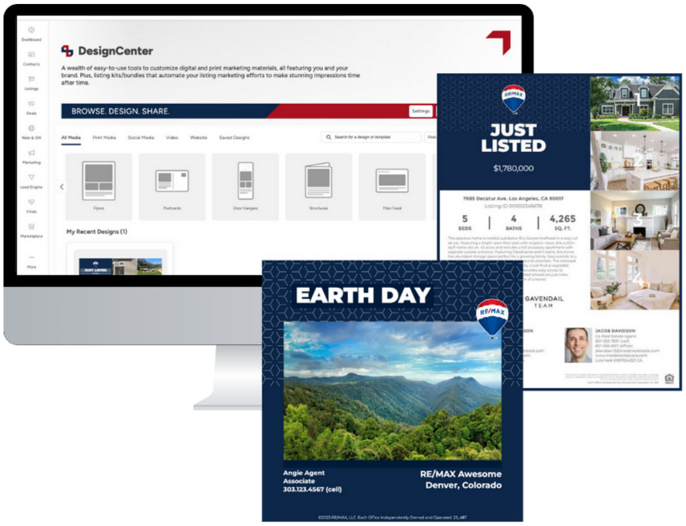

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ListingMachine DesignCenter

ListingMachine & DesignCenter offers two great features in one. ListingMachine is designed to offer your agents listing presentations and listing marketing materials. The DesignCenter features offer customizable marketing materials, including social media posts, flyers or postcards.

1 GET TO KNOW LISTINGMACHINE & DESIGNCENTER

ListingMachine and DesignCenter gives you the tools you need to support your agents, promote your office listings and market your brand. But before you dive in, be sure you understand what these two incredible solutions have to offer!

- ☐ Read the **ListingMachine Overview >**
- ☐ Read the **DesignCenter Overview article >**

2 CONNECT YOUR SOCIAL MEDIA ACCOUNTS

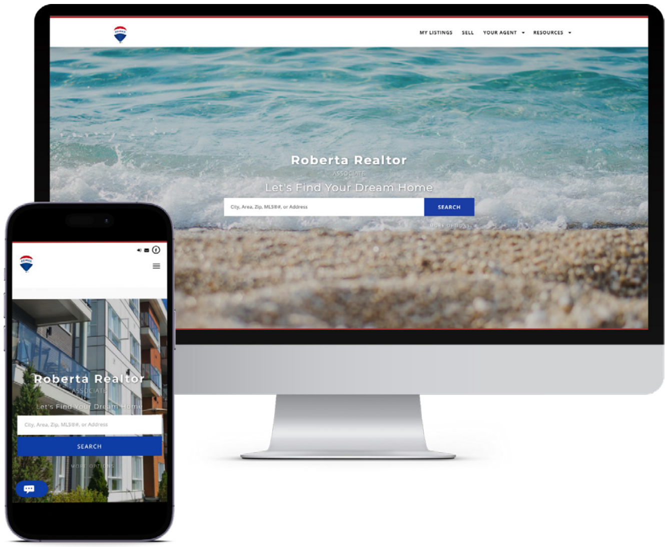
If you haven't already connected your social media accounts to MAX/Tech powered by BoldTrail, now is the perfect time. Once completed, the platform will be able to post on your behalf.

- ☐ Connect your office's social media accounts inside the Settings and Media Library section of DesignCenter.

3 START DESIGNING WITH DESIGNCENTER

Take your office marketing to the next level with DesignCenter! This solution is full of RE/MAX-branded templates that you can use to promote office listings, upcoming open houses, recruit new agents and more!

- ☐ Choose a design template from the Recruiting & Retention category to create marketing materials for flyers, postcards, social media and more.
- ☐ Select a design and begin customizing it.
- ☐ Download or print your design or choose to post it directly to social media.



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Web + IDX

Your MAX/Tech 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.

1 LEARN MORE ABOUT YOUR WEBSITE

While your MAX/Tech powered by BoldTrail office 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 brokerage. 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 office website, you'll be able to change several things to help build your brand directly into your website, including the text, header image, widget layout, navigation and more.

- ☐ Choose a theme for your website.
- ☐ Add your own header image.
- ☐ Update the home page widget layout to one that works best for your business goals.
- ☐ Add your brokerage logo that will appear along side the official RE/MAX logo.
- ☐ Update the listing carousels to showcase the types of listings you want to promote.

3 UPDATE YOUR SERVICE AREA PAGES

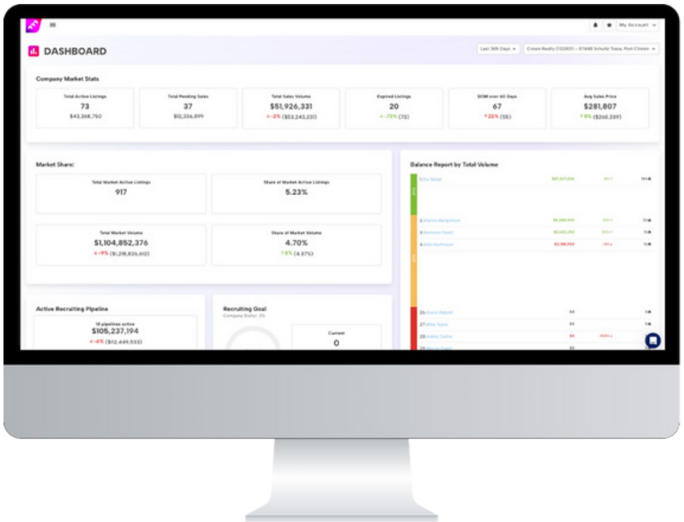
Local area pages are one of the best ways to improve your search engine ranking and offer value to your audience. Luckily, your MAX/Tech powered by BoldTrail office website can easily create these pages using the information provided by your MLS.

- ☐ 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 or your own photos.

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 RE/MAX custom page that is automatically added to your website to help with your recruiting efforts.



MAXTECH℠ powered by BoldTrail

BackOffice

Modernize your operations with a single, streamlined solution for managing agent onboarding, billing, commission tracking and disbursements, reporting and accounting – so your brokerage can run smoothly and profitably.

1 FIND YOUR LAUNCH DATE

MAX/Tech powered by BoldTrail BackOffice will begin launching soon.

- [ ] **Visit RE/MAX University to find your launch date >**

2 LEARN MORE ABOUT BACKOFFICE

This solution will provide you with transaction and agent management, commission automation, reporting and analytics, and other features to help you streamline your back-of-house operations.

While you wait for access, **review the overview materials >**

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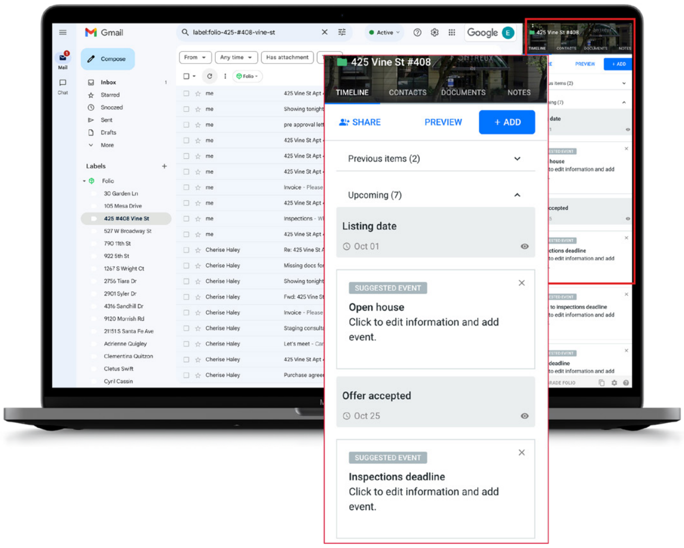

Agents can keep important transaction emails and timelines organized with this AI-powered email productivity solution. Serving as an email smart assistant, Folio intelligently organizes agents' inboxes, manages transaction conversations and shares consumer-facing transaction timelines to keep clients informed.

1 UNDERSTAND THE AGENT ONBOARDING PROCESS

Before agents can get started with Folio, they'll need to be invited! When ready to onboard, they will receive an email from folio@amitree.com.

2 WATCH A FOLIO WEBINAR

Get introduced to Folio and see first-hand how it can help agents stay organized and reduce any stress during the transaction process by watching an on-demand webinar from Inside Real Estate.

☐ Sign up + watch the on-demand **Folio for RE/MAX webinar >**

3 TALK TO YOUR AGENTS ABOUT FOLIO

Once you fully understand what Folio is and how agents can begin leveraging it, make sure you are encouraging them to begin their onboarding process.

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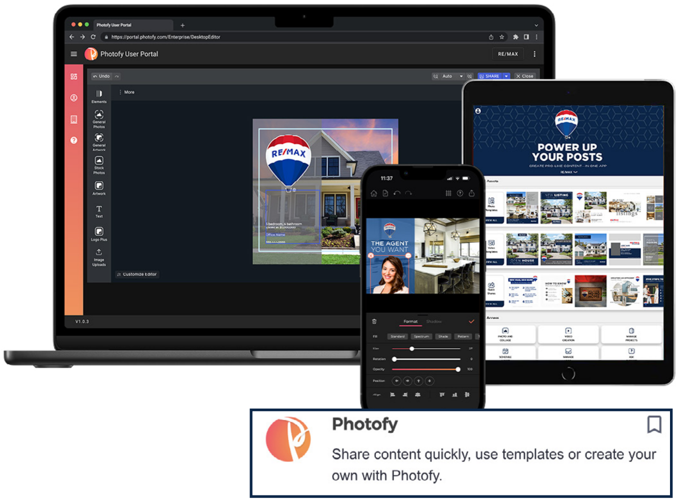


Create professionally branded content for your social media and digital channels from a library of customizable and simple-to-use templates. Use the content you create to build your brokerage's online brand, lift up your agents, level-up your recruiting strategy and much more.

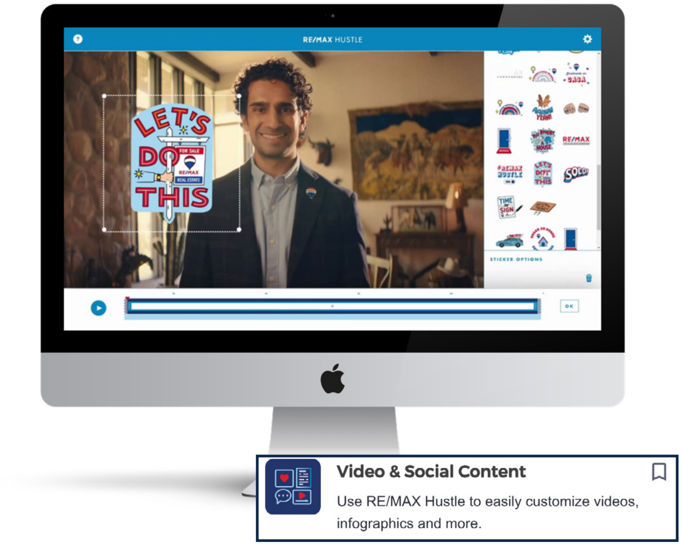
1 DISCOVER PHOTOFY

Before you dive into using Photofy, you'll need to create an account. Download the Photofy app and explore the Desktop Creator.

- [ ] Take the **Getting Started with Photofy for Recruiting + Retention course >**
- [ ] Sign up and install Photofy.
- [ ] Explore the different three galleries available to you: Personal, RE/MAX and Recruiting for RE/MAX
- [ ] Watch the **Photofy Desktop Creator for Brokers video >**

2 DEVELOP A ROUTINE

- [ ] Take time to celebrate one of your agents each week using the templates within the Agent Recognition tab in Photofy.
- [ ] Incorporate Photofy into your recruiting strategy by taking advantage of the many RE/MAX Recruiting templates available.
- [ ] Use the Unstoppable Starts Here campaign templates to promote the RE/MAX value proposition.
- [ ] Help your agents generate new leads by creating graphics to promote their listings! Post them on social media, tagging the agent and linking to the property details page.
- [ ] Use Photofy's vast template library to celebrate special holidays. Use the post scheduler in the Photofy Desktop Creator to schedule your posts in advance.
- [ ] Fine-tune your social media strategy by taking time each week to review which of your posts performed best. You can use the Photofy Desktop Creator to view analytics of all your past posts.



RE/MAX HUSTLE

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

1 DISCOVER RE/MAX HUSTLE

- [ ] Take the **Getting Started with RE/MAX 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 RE/MAX National Ad Campaigns that you can seamlessly personalize. 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 RE/MAX Hustle Video Editor video >**

4 CREATE CUSTOM GRAPHICS

RE/MAX 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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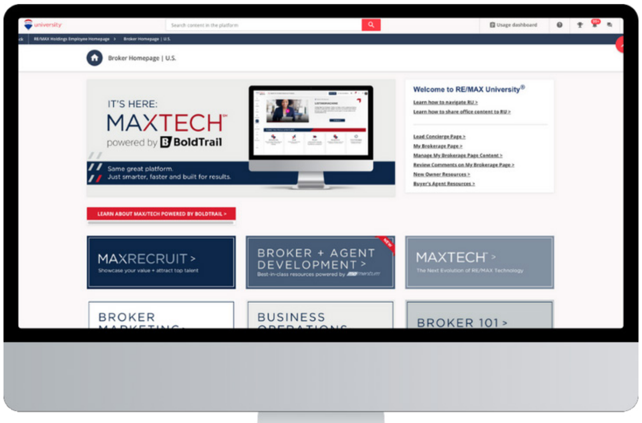

Learning & Education
Access videos, resources, designations and more in RE/MAX University.

Customer Support
Open tickets and receive support on tools and product services.

university & customer support

RE/MAX provides you continuous education and support to help you and your agents advance in your real estate career.

RE/MAX UNIVERSITY

RE/MAX University is your home for any continuing education in real estate, technology, and business support. It houses certifications and designations and access to nationally recognized real estate and productivity coaches.

- [ ] Access RE/MAX University via MAX/Center.
- [ ] Download the RE/MAX University app from your mobile device's app store.
- [ ] Explore RE/MAX University via the guided walkthrough: **Getting Started in RE/MAX University as a Broker course >**
- [ ] Review your home page. Click on the tiles to access helpful content like the **Office Meeting Ideas >** to help you engage your agents during your monthly sales meetings.
- [ ] Download the RE/MAX University app from your mobile device's app store.

CUSTOMER SUPPORT

Customer Support gives both you and your agents a direct line to a team of technology experts and system administrators ready to provide any assistance at a moment's notice.

- [ ] Watch the **How to Access Customer Support video >**
- [ ] Watch the **Submitting a Ticket Through Customer Support video >**
- [ ] Save the Customer Support contact information in your phone:

TEXT OR CALL
1.888.398.7171

EMAIL
customersupport@remax.net

LIVE CHAT
Visit the Customer Support tile within MAX/Center

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