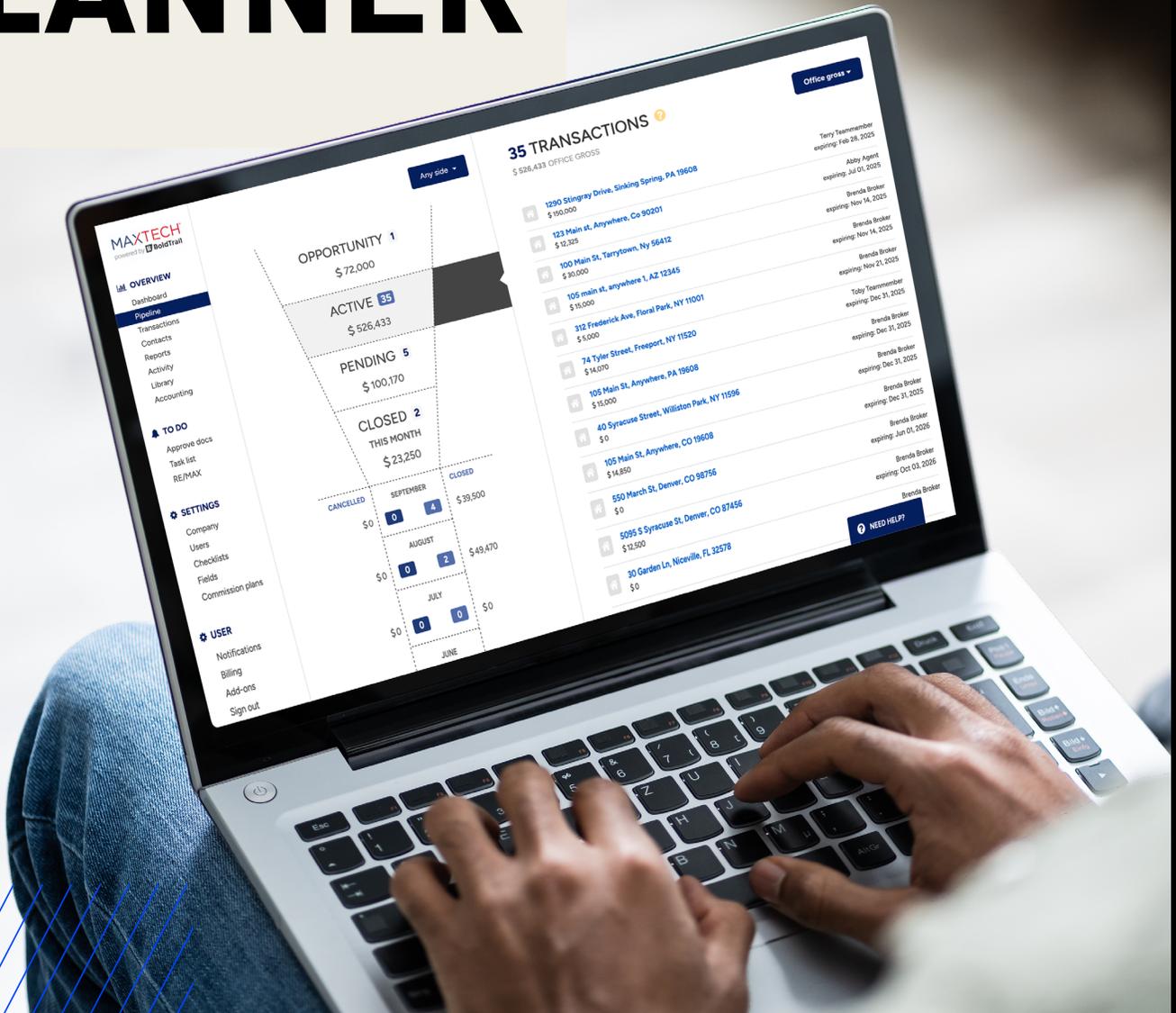




BROKER/OWNER

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.

TABLE OF CONTENTS

Click the tiles below to jump ahead.

MAXCENTER®

AGENT OFFICE
PORTAL

MAXRECRUIT®

MAXTECH®
powered by  BoldTrail

 Recruit

 BackOffice

MaaS

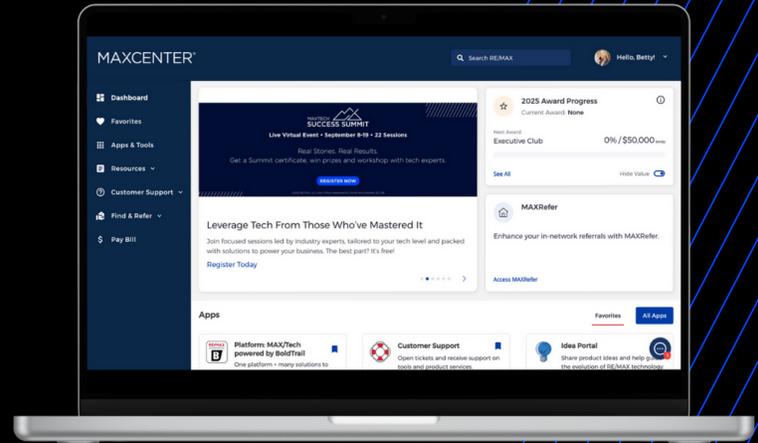
 **REMAX**
HUSTLE

Photofy

 **REMAX**
University

MAXCENTER®

MAXCenter® is your starting point for accessing the resources REMAX® has to offer! This is also home to your personal MAXProfile and office MAXProfile, where critical information related to your brand, MLS and service areas are configured. Every broker/owner should follow these exercises at least once.



1

SET UP YOUR MAXPROFILE

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

PERSONAL MAXPROFILE

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 MAXPROFILE

Complete your office profile, specifically your office bio which will appear on your office website as well as remax.com.

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 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



U.S. Agent Broker Hub



Video & Social Content



MAXReferSM



MAXEngageSM



REMAX MarketplaceSM



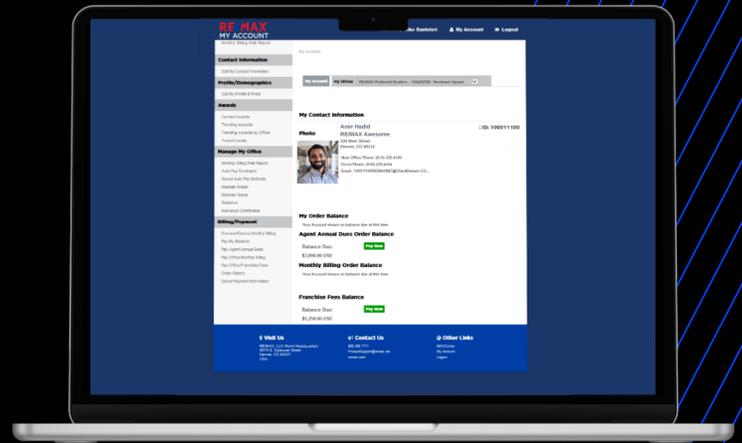
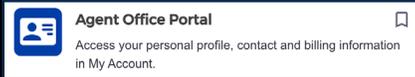
REMAX Miracle System (U.S.)



Customer Support

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

4

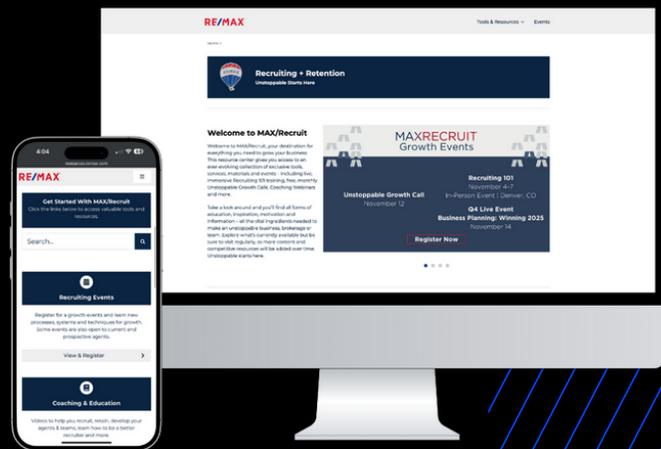
DISCOVER REMAX AWARDS

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 >>](#)

MAXRECRUIT®

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



1

EXPLORE MAXRECRUIT

On MAXRecruit, 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 REMAX event to prospects.

LEARN HOW TO BE A BETTER RECRUITER

Learn from peers and MAXRecruit coaches through on-demand videos.

Watch the latest [Coaching Webinar >>](#)

LEVERAGE MARKETING & TECHNOLOGY WITH RECRUITS

Download consistently updated recruiting and retention 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 REMAX broker/owners have grown through mergers and acquisitions.

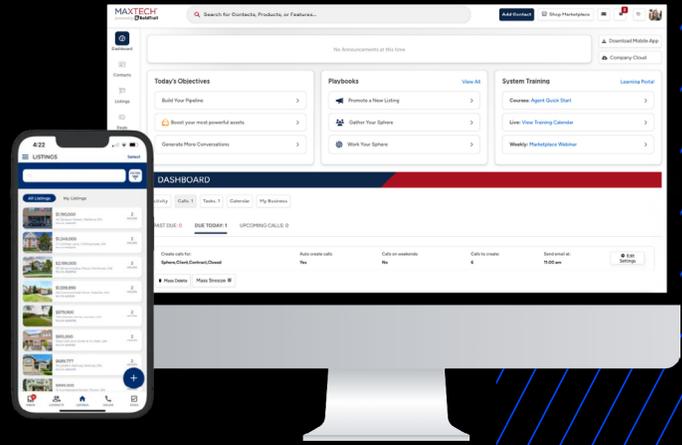
2

CREATE A RECRUITING PLAN

Now that you've explored MAXRecruit 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.

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



1

GET STARTED

Once your office is ready to onboard 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.

- 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

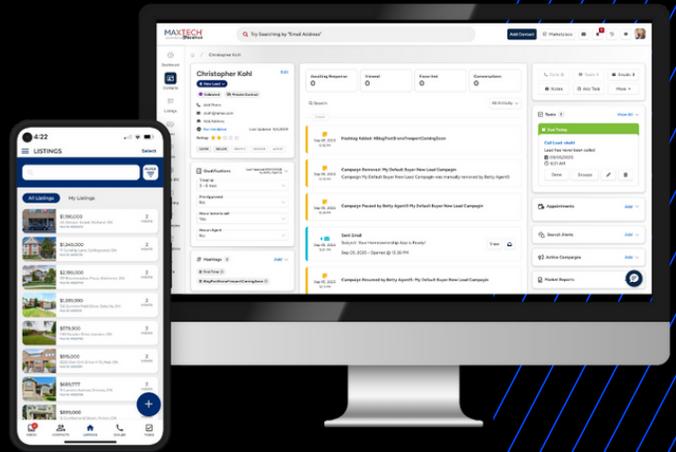
COMPLETE THE ADMIN QUICK START COURSE

Get a jump start on MAXTech powered by BoldTrail with this Quick Start course. You'll 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.

SMART CRM

Your MAXTech 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 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 contact list.

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 you have a contact that is 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 about their families, their birth dates, home anniversary dates and even their home search preferences if they are currently in the market.

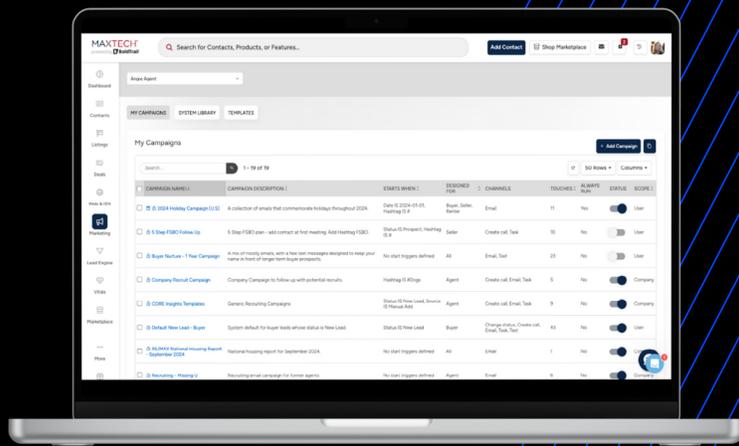
Add your contacts' birth dates.

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.

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 in both your and your agents' platform so that you can better understand how they work and what triggers them.

Review your agents' default Smart Campaigns.

Review your pre-existing recruiting 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

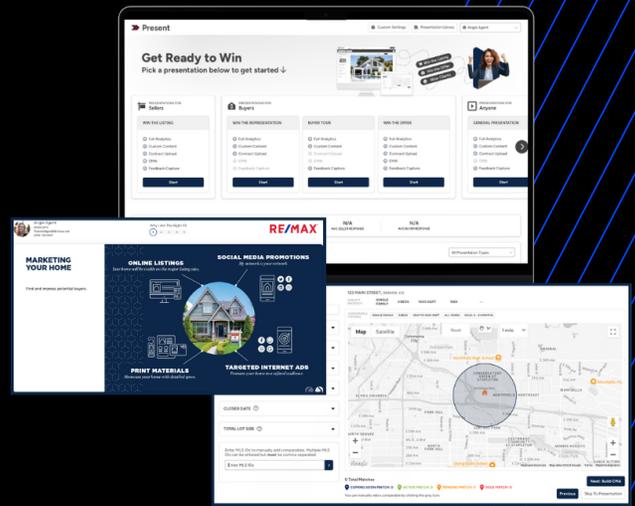
As a MAXTech powered by BoldTrail admin, you have the power to build Smart Campaigns and send them to your agents to use in their own businesses.

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 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.

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 is available inside 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 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.

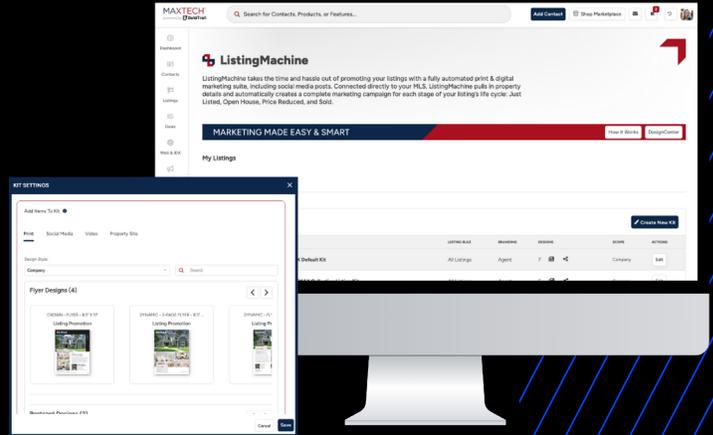
Use the Create a Slide tool within Present to build slides for your agents to use. Try to personalize these slides to your unique brokerage and market. If you have slides that are already saved to your computer as images or PDFs, you can upload those as well.

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 as a recruiting solution to create presentations for potential recruits with real-time tracking capabilities.

ListingMachine DesignCenter

ListingMachine & DesignCenter offers two great features in one. ListingMachine is designed to offer your agents listing presentations and 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 give 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 article >>](#)

Read the [DesignCenter Overview >>](#)

2

CONNECT YOUR SOCIAL MEDIA ACCOUNTS

If you haven't already connected your social media accounts to MAXTech 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 DESIGN CENTER

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

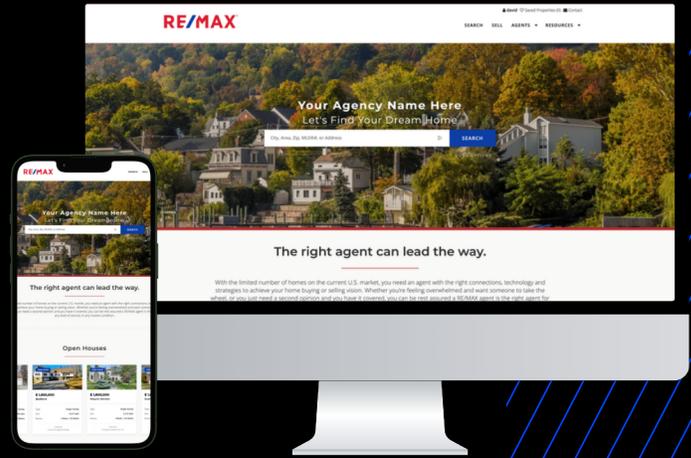
Choose a design template from the Recruiting & Retention category to create marketing materials for flyers, postcards, social media and more.

Select a design and begin customizing it.

Download or print your design or choose to post it directly to social media.

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.



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'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.

Add your own header image.

Update the home page widget layout to one that works best for your business goals.

Add your office logo that will appear along side the official REMAX logo.

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 one of the best ways to improve your search engine ranking and offer value to your audience. Luckily, your MAXTech powered by BoldTrail 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, your own photos and more.

4

CREATE NEW PAGES

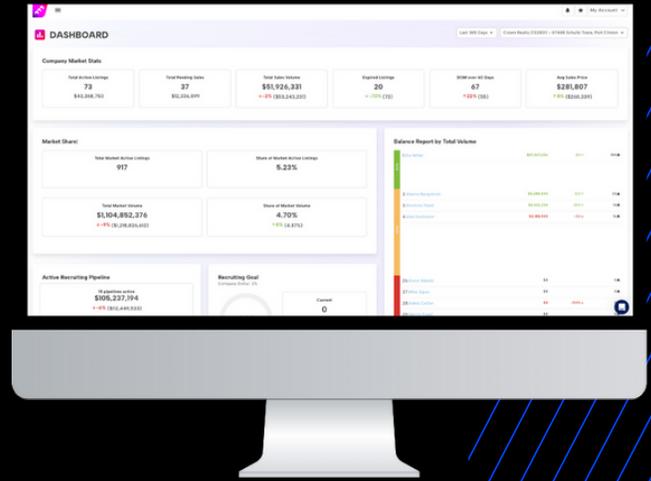
You can create multiple custom web pages that engage and inform your audience. These pages should provide value to local consumers and consistently drive traffic to your website.

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.



BoldTrail Recruit is an all-in-one solution for recruiting, retention and growth. Conduct meaningful recruiting and value proposition conversations, track key business metrics, increase agent productivity and drive smarter recruiting practices.



1

GET STARTED WITH BOLDTRAIL RECRUIT

Kick off your journey by learning the basics of BoldTrail Recruit and setting yourself up for success.

Watch a recorded webinar to learn more about how Recruit can help you attract and retain agents.

If you have not onboarded to Recruit yet, connect with your Customer Success representative.

2

ADD YOUR RECRUITING GOALS

Before diving into the system, take a moment to think about your goals. You can add these goals into Recruit to track your progress over time.

Determine your office's recruiting targets (number of agents you want to recruit and your production goals).

Add your goals to Recruit in the profile settings section.

3

FIND PROSPECTS BASED ON YOUR GOALS

With your goals in place, it's time to identify the right agents. Recruit helps you filter by production level, brokerage and location, making it easy to create a watchlist that keeps your outreach organized.

Search for agents in your MLS that meet your brokerage needs.

Add agents to your watchlist to create a prospecting pipeline that can help you stay organized and on top of your communications.

Turn on notifications to alert you when agents you follow have recent activity.

4

INVOLVE YOUR AGENTS IN THE RECRUITING PROCESS

Recruiting doesn't have to be a solo effort. By leveraging co-broke surveys and encouraging input from your agents, you create a more authentic connection with prospects.

Review the default templates for co-broke surveys and modify or create new ones to align with your goals.

Send a survey to an agent who has recently worked with another agent you are interested in recruiting.

5

FOCUS ON RETENTION

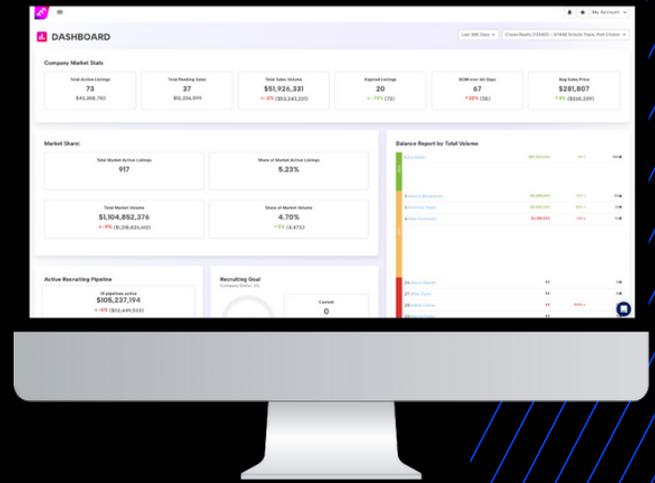
Growth isn't just about bringing in new agents – it's about keeping the ones you have engaged and thriving. Use Recruit to track production, celebrate wins and identify coaching opportunities.

Add your existing agents to your watchlist to track production and congratulate them when they close a deal.

Review agent production statistics for potential coaching conversations.

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

GET STARTED WITH BOLDTRAIL BACKOFFICE

Watch a few recorded webinars to learn more about BackOffice.

[BackOffice Set Up & Strategy: Transaction Management >>](#)

[Running Your Business With BackOffice >>](#)

If you have not onboarded yet, connect with your Customer Success representative for more information. Complete onboarding through OnRamp, Inside Real Estate's Onboarding Platform.

Gain access to an Implementation Specialist at Inside Real Estate.

Access guided modules and 'how-to' training videos.

Attend daily office hours for real-time support and troubleshooting.

2

PREPARE FOR YOUR QUICKBOOKS INTEGRATION

Work with your accountant or financial team to identify a plan that best fits your need. [Find your plan >>](#)

Connect BackOffice with QuickBooks so transactions flow smoothly.

Review your [chart of accounts](#) so it aligns with your business.

Consider who will be responsible for posting and reconciling each transaction.

3

IDENTIFY CUSTOMIZATION NEEDS FOR YOUR OFFICE

Review your custom field options and add any that are relevant to your business or market. This could relate to how your brokerage manages transactions, offers, contact details and more. **Pro tip:** Create a custom field for anything you want to create a report on.

Review default checklists and modify any to best fit your needs to make sure agents don't miss any critical steps in the transaction process.

Consider any custom forms you use in your office and add these to BackOffice to save time in the future.

4

SET UP AND ASSIGN ROLES & PERMISSIONS

Add your team members and give them the right level of access.

Who is involved in the transaction process at your office? Who oversees compliance? Do you have a team member responsible for new agent onboarding? Make sure these individuals are given access to the platform.

5

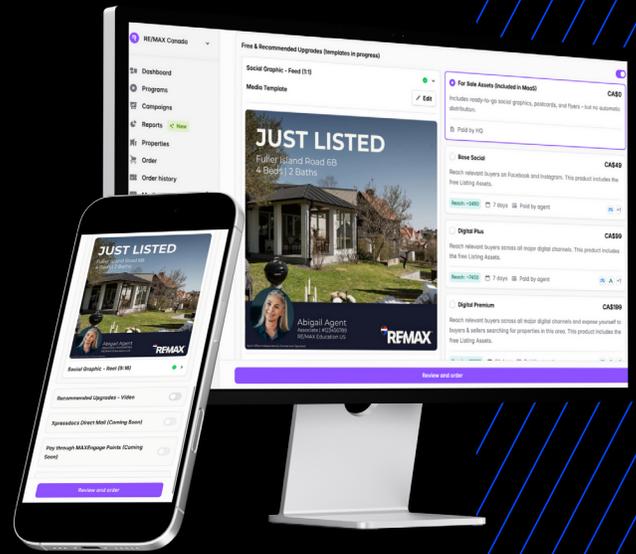
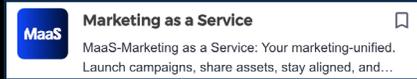
ACCESS TRAINING POST-ONBOARDING

If you need to refer to any of the onboarding set up videos after you complete OnRamp, you can access them on REMAX University®. This is a great resource for staff members who were not involved in onboarding or that were hired after your launch. [Getting Started with BoldTrail BackOffice >>](#)

Access [BoldTrail BackOffice help articles from Inside Real Estate >>](#)

MaaS

Marketing as a Service (MaaS) is your one-stop-shop for marketing needs, giving agents more time back to focus on more on winning more listings and building a strong, lasting business. This evolving solution supplies you with marketing assets and campaigns powered by AI and comprehensive REMAX data to deliver the best results.



1

GETTING STARTED & ACCESSING MAAS

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

Access the platform via MAXCenter.

Keep an eye out for email notifications letting you know marketing opportunities are available.

You and your agents will receive event-based email notifications to choose your marketing plan based on which campaigns are available and turned on.

2

UTILIZING MAAS

Start folding MaaS into your regular marketing routine.

View user activity, campaign metrics and launch your own listing and recruiting campaigns.

Customize your assets using the REMAX-branded templates to easily tailor your marketing materials to fit your unique style.

Download complimentary assets, or launch paid ad campaigns across Meta (Facebook & Instagram), Google Display Network and Google Search for an additional cost.

3

CUSTOMIZATION IN MAAS

MaaS offers the flexibility agents and teams need to make every campaign their own. With customizable, REMAX-branded templates, easily tailor marketing materials to fit your unique style or team identity.

Reach out to Customer Support to set up an onboarding call and learn how to customize the platform for your office and add complimentary options for your agents.

4

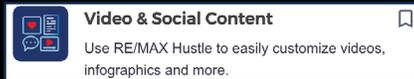
STAY UPDATED ON UPCOMING RESOURCES

MaaS is designed to evolve with new marketing solutions and resources being added regularly.

Read your REMAX Update emails to stay updated on MaaS additions.

REMAX 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 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 REMAX Hustle Video Editor video >>](#)

4

CREATE CUSTOM GRAPHICS

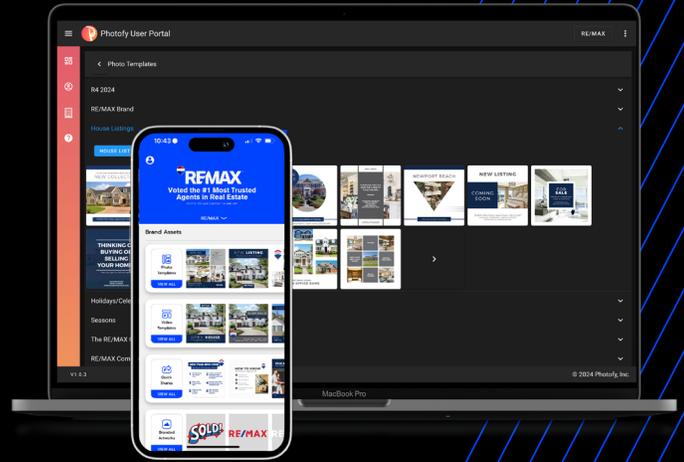
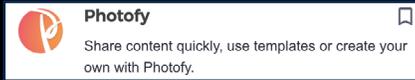
REMAX Hustle offers more than just videos. Use this handy solution to create custom graphics to share on social media that celebrate your agents' accomplishments.

Create a Hustlegraphic that outlines an agent's career wins from the past year.

Post a Digital Welcome Mat to welcome any new agents.



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.



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 three-different galleries available to you: Personal, REMAX and Recruiting for REMAX

Watch the [Photofy Desktop Creator for Brokers video >>](#)



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 REMAX Recruiting templates available.

Use the Unstoppable Starts Here campaign templates to promote the REMAX 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.

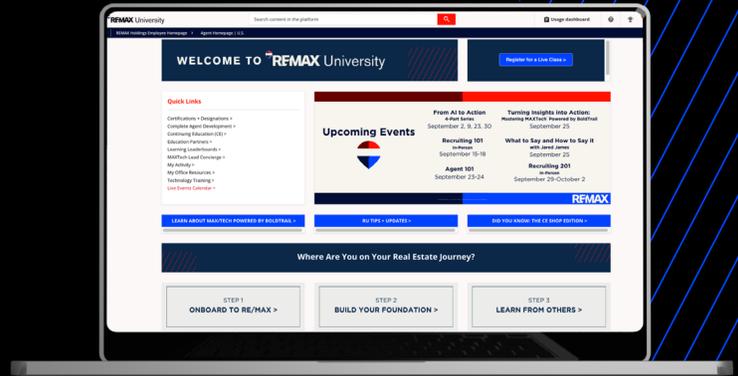
Use Photofy's vast template library to celebrate special holidays. Use the post scheduler in the Photofy Desktop Creator to schedule your posts in advance.

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