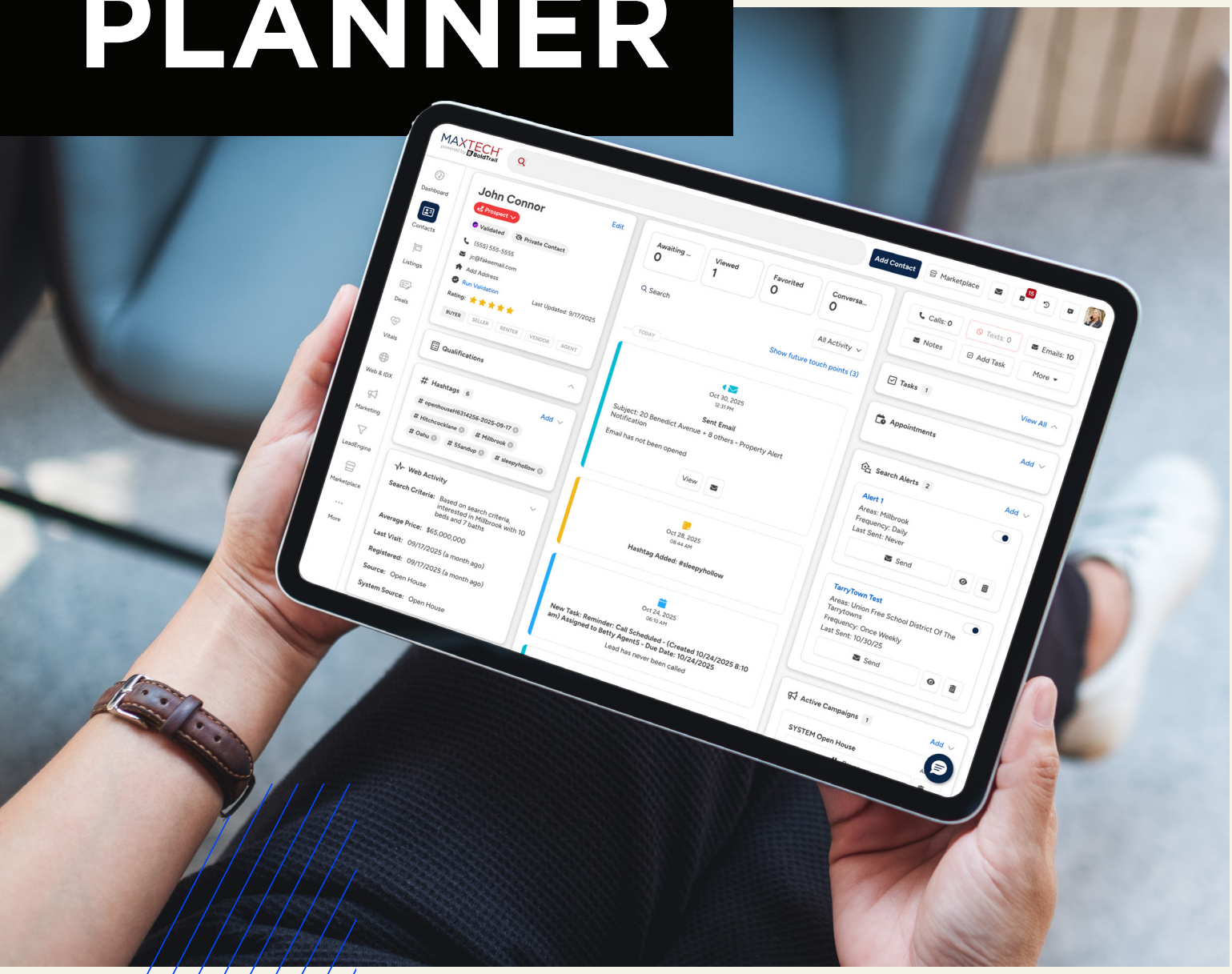
RE/MAX

AGENT

TECH PLANNER



Master MAXTech® and develop daily best practices.

Welcome to the Agent 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 business.

Whether you're new to these solutions or looking to level up your 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 solution 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

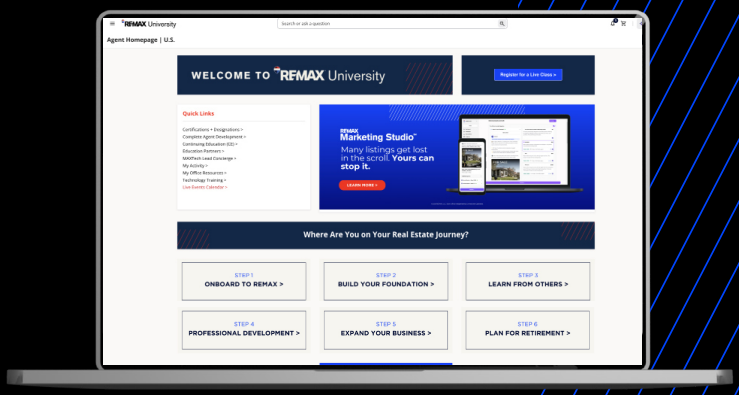
RE/MAX HUSTLE

MAXENGAGE℠

REMAX University

REMAX University® is your home for continuing education, technology training and business support. It also offers access to certifications and designations as well as real estate and productivity coaches.





1 DISCOVER REMAX UNIVERSITY

The real estate industry is always changing, and the best agents never stop learning. By investing in your growth, you stay ahead of market shifts, adapt to new technology and deliver more value to your clients. Take the next step in your growth journey and dive into REMAX University today.

- ☐ Access REMAX University via SkyView.
- ☐ Download the REMAX University app from your mobile device's app store.
- ☐ Explore REMAX University: **Getting Started in REMAX University as an Agent >>**
- ☐ Register for an upcoming **Learning & Development Session >>** such as Agent Essentials or a monthly technology workshop.

1 BUILD A FOUNDATION WITH YOUR TECH SOLUTIONS

Throughout this planner, you'll find links to trainings that help you learn how to use our technology solutions. But if you're new to tech and want to go deeper, it is strongly encouraged to complete the Agent Technology Foundations series. These are 8 courses, available live online and on-demand, that focus on critical first steps for making the most of your tools.

- ☐ Visit the **Agent Technology Foundations page >>** and watch the series on-demand or sign up for an upcoming live session.

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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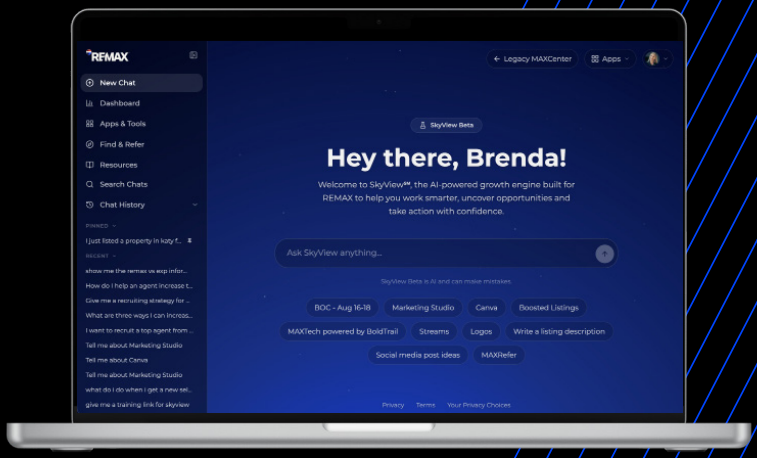
SkyView℠

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



1 SET UP YOUR REMAX PROFILE

Your REMAX Profile is available in SkyView and is a critical first step. Setting this up properly ensures your listings appear on remax.com and that you are able to receive leads on those listings. It will also feed your information into many of the other solutions discussed in this planner, including MAXTech powered by BoldTrail, MAXRefer, Marketing Studio and others.

- ☐ Click on your name in the upper right corner of SkyView to access your profile.
- ☐ Upload a current and high-resolution headshot.
- ☐ Add your contact information (specifically your email address and mobile number).
- ☐ Complete your profile by adding your personal and professional details.
- ☐ Confirm your MLS ID and Service Areas are correct.
- ☐ Set your lead preferences by adding zip codes.

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**
- **Marketing Studio**
- **MAXTech Lead Concierge**
- **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:

- ☐ Create a 30-day onboarding checklist.
- ☐ How can I market my listings?
- ☐ Show me training for BoldTrail.
- ☐ What should every new REMAX agent do first?

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

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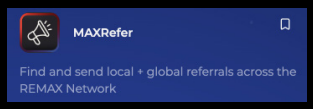
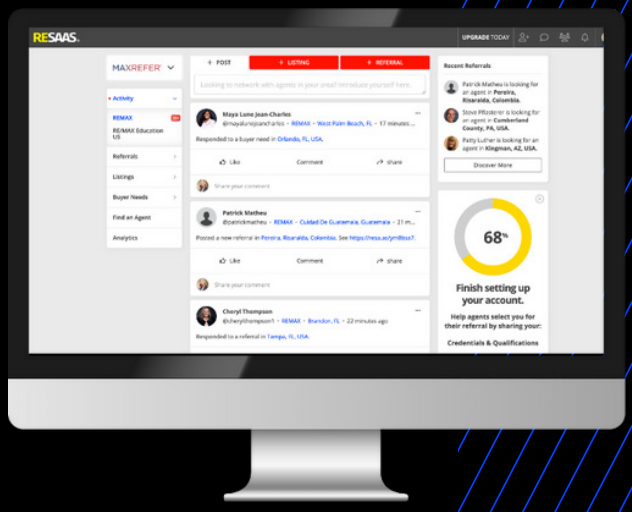
MAXREFER℠

MAXRefer connects you with REMAX associates worldwide to help you place and receive referrals with ease. Powered by AI and integrated into MAXTech® powered by BoldTrail, it makes finding the right agent, submitting opportunities and tracking transactions seamless from start to finish.





1 UPDATE YOUR PROFILE

A complete and accurate profile helps other agents easily find you and trust you with their referral clients.

- ☐ Review your profile to make sure all details have pulled correctly from your REMAX Profile in SkyView.
- ☐ Add any specialties, languages spoken and service areas to help others find you if you haven't already added that information to your REMAX Profile.

2 EXPLORE THE AGENT SEARCH

Learning how searching and filtering within the platform saves time and helps you quickly connect your clients with the best-fit REMAX associates.

- ☐ Use filters in MAXRefer to search for agents by location, specialty or language.
- ☐ Practice searching for an agent in a market where clients may need support.

3 ENGAGE WITH REFERRALS

Actively engaging with referrals ensures you don't miss out on opportunities and helps you build strong business relationships.

- ☐ Browse open referrals in your area and submit your interest if you're a right fit.
- ☐ Try entering a referral opportunity for a buyer or seller client to see how the process works, but remember to not submit it unless it is an official referral.

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

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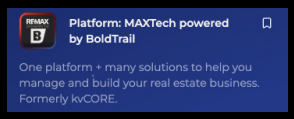
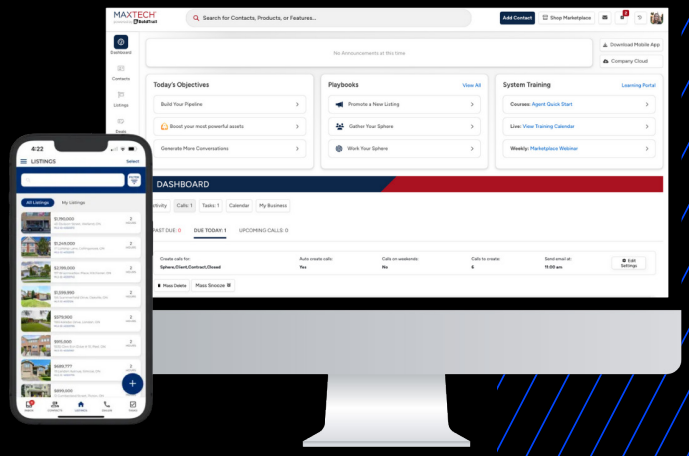
MAXTECH®
powered by BoldTrail

A robust platform offering pre-designed websites, lead management, Smart CRM, scheduled marketing, transactions integration, business intelligence and more.





1 GET THE INVITATION

Once your broker/owner invites you to onboard, you'll receive an email from Inside Real Estate at **no-reply@boldtrail.com** with details on how to access your new solutions.

2 COMPLETE THE AGENT LAUNCH CHECKLIST

Begin your onboarding journey by completing the steps in the **Agent Launch Checklist.** This checklist is accessible from your BoldTrail Dashboard when you first login.

- ☐ Complete your profile by updating the information in your REMAX Profile.
- ☐ Download the Streams app and Open House app within the platform.
- ☐ Personalize your website.
- ☐ Import your contacts.
- ☐ Power up automation.
- ☐ Generate new leads.

3 TAKE THE AGENT QUICK START COURSE

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

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

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

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MAXTECH®
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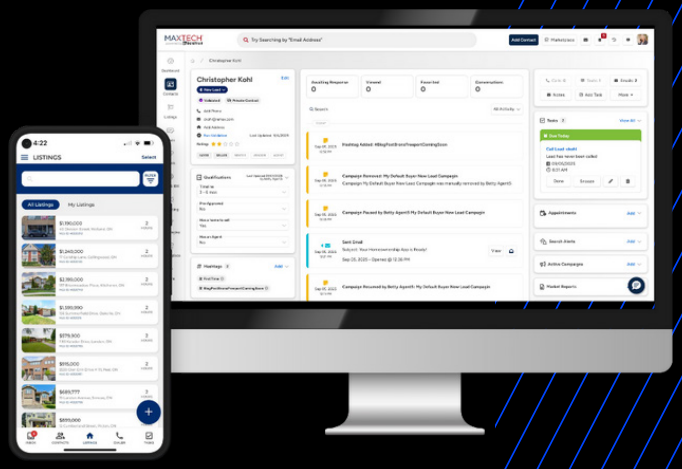
SMART CRM

Your MAXTech powered by BoldTrail Smart CRM is your database of contacts and where your lead conversion pipeline begins. Here, you'll find all of your clients' important information and can sort them by filters, add notes in their Contact Record, assign tasks and more.



1 ADD YOUR CONTACTS TO YOUR NEW DATABASE

The first step to take to setup your 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.
- ☐ Update each contact's lead type (Buyer, Seller, etc.) and status (Sphere, Prospect, Client, etc.).
- ☐ Add relevant hashtags to better categorize your contacts.

3 ADD ADDITIONAL INFORMATION

Take your Contact Records to the next level by adding additional information to the Profile Details section for individuals in your database.

- ☐ Add your contacts' birth dates.
- ☐ If they are a past client, add their home anniversary date.
- ☐ If they are a potential or current buyer, add home preferences and set up a Saved Search.
- ☐ If they are a potential or current seller, set them up on a monthly Market Update report.
- ☐ Add any familial details such as spouse/partner names and contact information.

MAXTECH®
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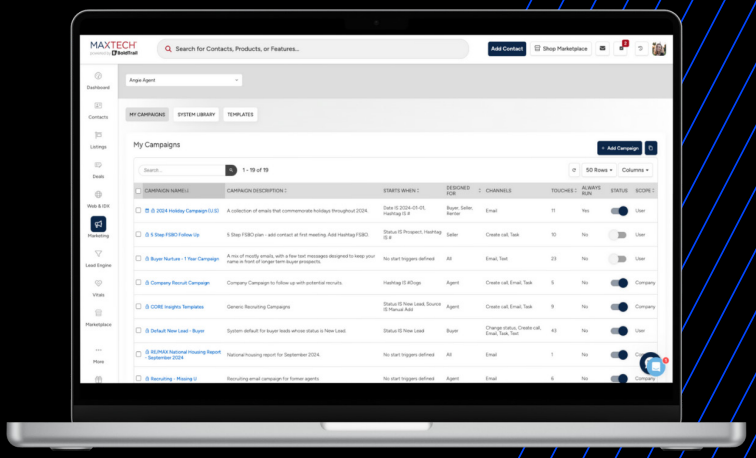
SMART CAMPAIGNS

Smart Campaigns are designed to keep you in touch and top of mind with your clients. 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

You have access to a wide range of pre-built Smart Campaigns that you can begin leveraging right away! Several campaigns are turned on by default once you get started in the platform; however, most of these only include task reminders to help hold you accountable. Regardless, it is highly recommended to review your default Smart Campaigns to understand how they work.

- [ ] Review your default Smart Campaigns, including:
  - [ ] Default Buyer
  - [ ] Default Seller
  - [ ] Default Contract Buyer
  - [ ] Default Contract Seller
  - [ ] Default Contract Renter
  - [ ] Default Active Buyer
  - [ ] Default Active Seller
  - [ ] Default Active Renter

3 TURN ON ADDITIONAL CAMPAIGNS

There are even more pre-existing Smart Campaigns in the System Library tab of your Smart Campaigns manager. Get to know these campaigns, add them to your own campaign library and brainstorm ideas for incorporating them into your business.

- [ ] Review the campaigns in the System Library tab.
- [ ] Choose two additional campaigns to add to your library and start leveraging.

MAXTECH®
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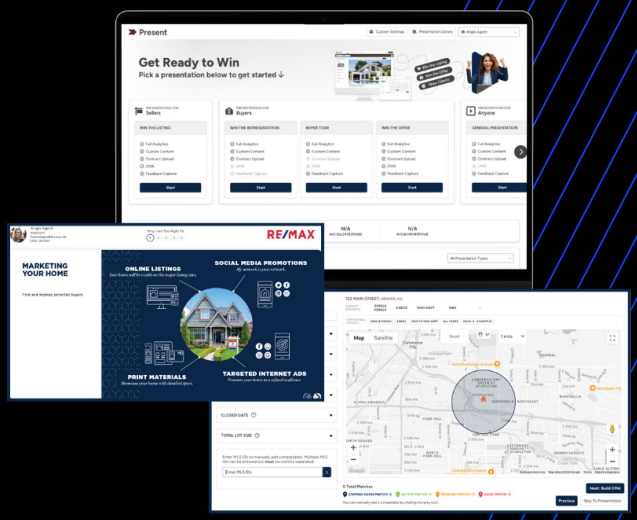
Present

Want to really impress your prospects and clients? Use Present as a convenient way to populate information from a Comparative Market Analysis (CMA) into slides a seller can browse through. Or build a listing tour for your buyers and wow your clients every time!



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.
- ☐ Customize your presentations in the Customization Settings section. Choose a default layout and update your About Me and Testimonials sections to streamline the presentation creation process in the future.

2 CREATE YOUR FIRST LISTING PRESENTATION + CMA

Wow potential sellers and win the listing through engaging CMAs and fully customized, beautifully branded presentations with real-time activity tracking. Get to know the platform further by creating your first listing presentation.

- ☐ Read the **Present: How to Create a Listing Presentation article >>**
- ☐ Create your presentation using the address of one of your prospects, a past client or one of your current listings.
- ☐ Work through the steps to customize the presentation for your chosen property.
- ☐ Share your presentation! This could be to a friend, a staff member or a potential client. Use the activity tracking features to review which pages the viewer spent the most time.

3 CREATE YOUR FIRST BUYER TOUR

Gone are the days of printed MLS sheets! Buyer Tours are here to offer additional value to your buyers and level-up your showing days.

- ☐ Create a Buyer Tour by adding the MLS IDs of the listings you intend to show.
- ☐ Arrange the listings in the order you plan to show them.
- ☐ Save and send the Buyer Tour to your buyers before showing day, preferably the day before. Encourage them to look through it in advance and rate the properties.
- ☐ On showing day, remove any properties they didn't want to see and print out a copy of your finished Buyer Tour so your buyers can take notes on each property as they look.

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

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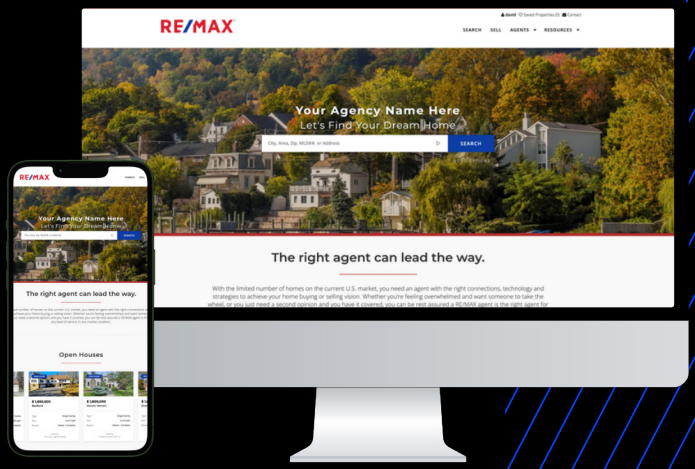
MAXTECH®
powered by BoldTrail

WEB & IDX

Your MAXTech powered by BoldTrail website is out of the box, beautifully branded and ready to go on day one! Use your website to highlight your business and listings, add value to your audience and capture new leads. Keep your website as is or customize it to better fit your unique business.



1 LEARN MORE ABOUT YOUR WEBSITE

While your MAXTech powered by BoldTrail website is ready to go on day one, you can still customize it to your brand and business. Take a moment to review your website's capabilities.

- ☐ 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.
- ☐ Add your personal 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 can improve your search engine ranking and offer value to your audience. Your 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

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.

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

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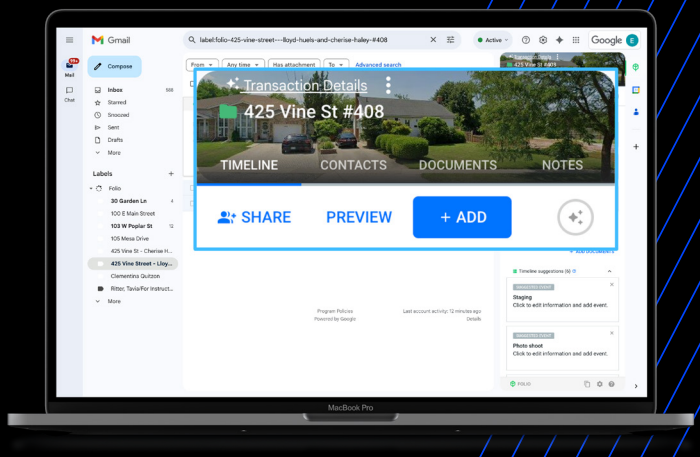
folio

Powered by BoldTrail

Keep important transaction emails and timelines organized with this AI-powered email productivity solution. Folio intelligently organizes your inbox, manages transaction conversations and shares consumer-facing transaction timelines to keep your clients informed.



1 GET THE INVITATION

Before you can get started with Folio, you'll need to be invited! You will receive an email from folio@amitree.com with instructions on setting up your account.

- [ ] Receive an invitation by email from folio@amitree.com and follow the included instructions to integrate Folio with your Gmail or Outlook account.

2 GET TO KNOW FOLIO

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

- [ ] Watch the on-demand Folio webinar >>

3 FULLY LEVERAGE FOLIO

- [ ] If you are using a Gmail account, download the Folio Chrome extension to your browser so you can manage your transactions right from your inbox.
- [ ] If you are using an Outlook account, manage your transactions on the desktop website: amitree.com/folio.

4 SET YOURSELF UP FOR SUCCESS

Make sure you are taking care of your future self by:

- [ ] Creating timeline templates to save time.
- [ ] Adding local resources and trusted vendors to those templates that clients can lean on.
- [ ] Adding local service providers and utilities that clients can reference.
- [ ] Connecting cloud storage for seamless document sharing.
- [ ] Verifying your profile information.

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

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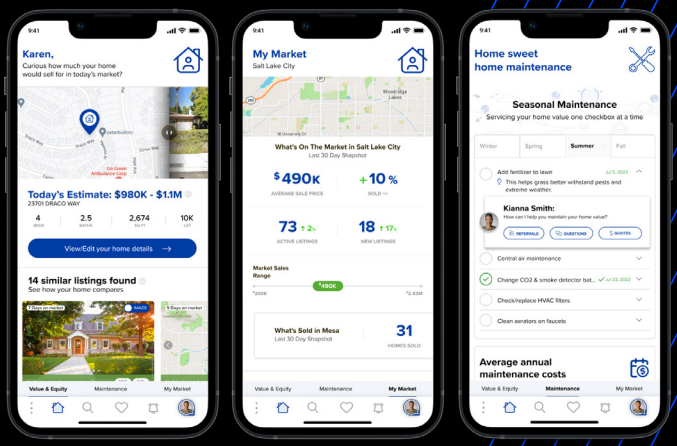
HomeView™

HomeView is a client-facing mobile app that keeps you connected to your buyers and sellers throughout their journey. From personalized property alerts to direct communication and transaction updates, HomeView creates a seamless experience while keeping your brand front and center.



1 DOWNLOAD THE APP YOURSELF

Experiencing HomeView as a client helps you understand exactly what they see, making it easier to guide them and highlight key features.

- ☐ Download the HomeView app yourself. Every agent's link is unique and you can find yours by logging into MAXTech powered by BoldTrail, clicking on your profile image and copying the link next to the phone icon.

2 INVITE CLIENTS TO DOWNLOAD HOMEVIEW

Engage your clients on HomeView instead of using third-party apps.

- ☐ Send your unique link to current and past clients via text or email through your Smart CRM.
- ☐ Encourage buyers and sellers to use HomeView as their one-stop search and home management app.
- ☐ Add your personal 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.

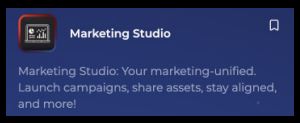
3 ENGAGE & TRACK ACTIVITY

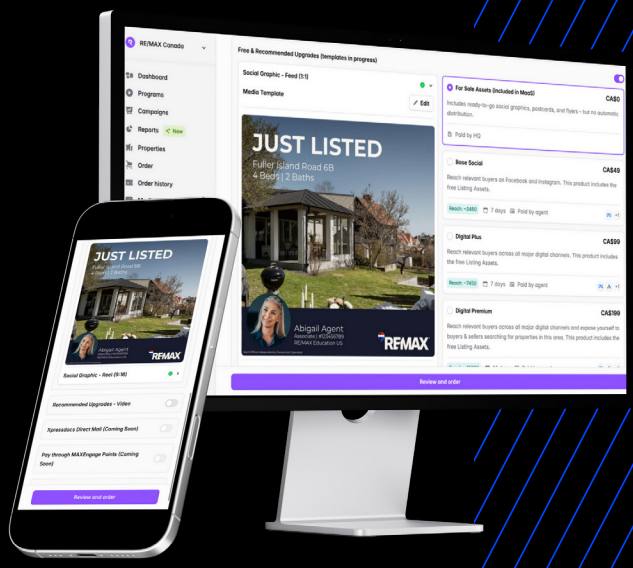
Monitoring client activity gives you insight into what they want, so you can provide timely, personalized support.

- ☐ Review your MAXTech powered by BoldTrail dashboard every day to stay on top of alerts, such as when clients favorite properties, request showings, ask questions and more.

REMAX Marketing Studio℠

Marketing Studio is your one-stop-shop for your marketing needs, giving you more time back to win listings and build 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

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 >>
- ☐ Keep an eye out for email notifications letting you know when marketing opportunities are available for new listings.

2 PROMOTE YOUR PERSONAL BRAND AND YOUR LISTINGS

Start leveraging pre-designed assets and campaigns into your regular marketing routine.

- ☐ Download complimentary assets or launch paid ad campaigns across Meta (Facebook & Instagram), Google Display Network and Google Search for an additional cost.
- ☐ Create an AI-generated listing video tour of your property for sale. (MLS compliant options available).
- ☐ View user activity, campaign metrics and launch your own campaigns.

3 SETUP AD AUTOMATION

Ensure every property gets exposure without all the heavy lifting with the help of ad automation.

- ☐ From the Marketing Studio Subscription Hub, choose to automate just listed promotions, open house alerts, AI-generated listing videos or self-promotion ads.
- ☐ Set 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.

4 LEVERAGE MARKETING STUDIO INTEGRATIONS

Marketing Studio continues to evolve with new marketing solutions and resources being added regularly. To give your listing maximum visibility:

- ☐ Promote your pre-MLS listing on Zillow Preview to gauge interest before your listing goes live on the market.
- ☐ Meet consumers where they're at by promoting your MLS listing on realtor.com or using Zillow Showcase for maximum visibility.
- ☐ Remax.com is the highest trafficked franchisor site. Get maximum visibility in your listing by boosting it on remax.com inside Marketing Studio.

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

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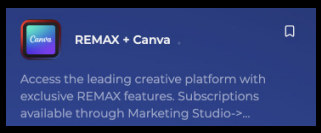
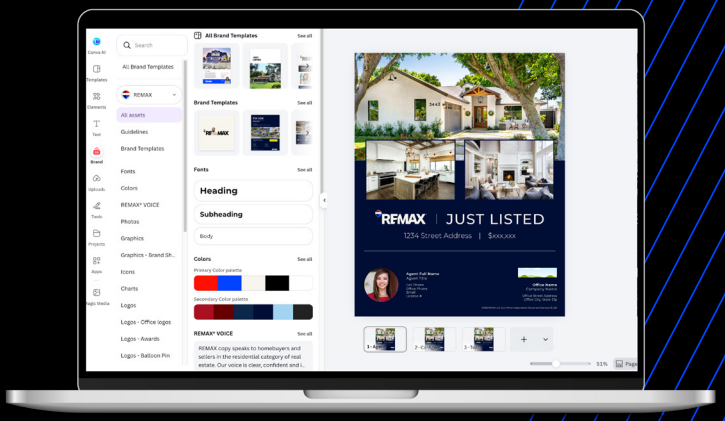
REMAX + Canva

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.
- ☐ Explore the brand templates and find the 'Dynamic Logo' template. Click the 'Use this Brand Template' to edit the template and put your brand front and center of the REMAX logo. Download the image and share to social media!
- ☐ Update an existing Canva template with REMAX colours and logo using the brand kit.

2 CREATE A LISTING GRAPHIC

Marketing your next listing has never been easier. With REMAX + Canva, you can access pre-designed templates and use the MLS connection to easily drag and drop listing details into your design.

- ☐ 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 listings. Drag and drop photos, listing details and your contact information to update the design to fit your needs and style.

3 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. Once you have finished your design in Canva, follow these steps to send it back to the REMAX ecosystem:

- ☐ 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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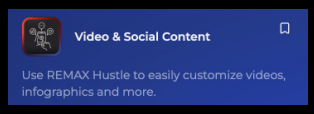
RE/MAX HUSTLE

REMAX Hustle helps you quickly and easily create videos to market your brand and listings, connect with members of your community and personalize national ad campaign commercials.





1 DISCOVER REMAX HUSTLE

- [ ] Take the **Getting Started With REMAX Hustle course >>**

2 EXPLORE THE PRE-MADE VIDEO TEMPLATES

- [ ] Review the library of pre-made video templates designed to promote yourself, your brand and even show support to your community.
- [ ] Click into a template and begin adding customizations like your name and contact information.
- [ ] Once you've finished 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 a new listing or highlights your expertise.

- [ ] Create a video with the Hustle Video Editor.

4 CREATE CUSTOM GRAPHICS

REMAX Hustle offers more than just videos. Use this handy solution to create custom graphics to share on social media or directly with your clients.

- [ ] Create a Hustlegraphic that outlines your career wins from the past year.
- [ ] Send a Digital Welcome Mat to welcome your new clients or to congratulate your buyers on a new home.

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

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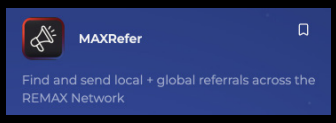
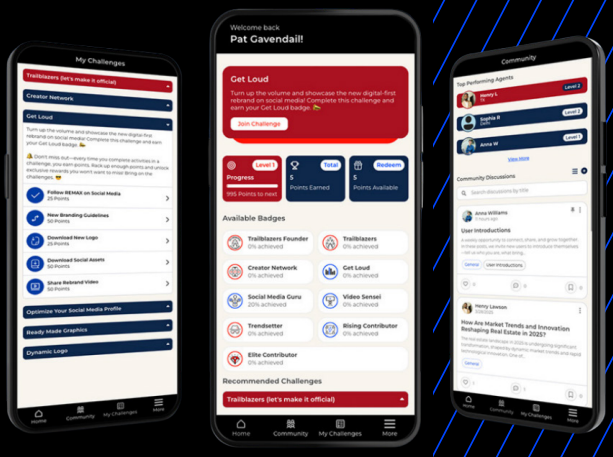
MAXENGAGE℠

MAXEngage makes growing your business fun — and rewarding. Complete challenges, connect with other agents, and climb the global leaderboard while earning points to use towards real-life rewards along the way.





1 GET STARTED WITH MAXENGAGE

MAXEngage is the ultimate app to grow your business, boost your brand and stay plugged into the REMAX network through fun, rewarding challenges.

- ☐ Download the app.
- ☐ Log in with your remax.net credentials. All details in the app will pull from your REMAX Profile, so you'll want to make sure it's up to date.
- ☐ Accept the Terms & Conditions and follow the video tour of the app.

2 CONNECT WITH OTHER AGENTS IN THE COMMUNITY FORUMS

Explore the community forums to connect with other REMAX agents, ask questions, post your wins and build new professional relationships.

- ☐ Agree to the community guidelines in the navigation menu.
- ☐ Explore the different topics available and comment, like or save a post.
- ☐ Create your own user introduction post!

3 COMPLETE CURRENT CHALLENGES

Start earning points to use towards real-life rewards by completing challenges.

- ☐ Pick a challenge to work on.
- ☐ Start completing actions and uploading proof to earn points.
- ☐ Climb the leaderboard and redeem points for REMAX swag and other incentives.

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

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