

MAXTECH<sup>SM</sup>

powered by  BoldTrail

B o l d T r a i l

E X P E D I T I O N

MAXTECH<sup>SM</sup>

powered by  BoldTrail

BoldTrail Expedition

FULL ONBOARDING  
CHECKLIST

**BLAZING THE TRAIL**



HEATHER H HOLLIDAY

Your Marketing & Tech Coach

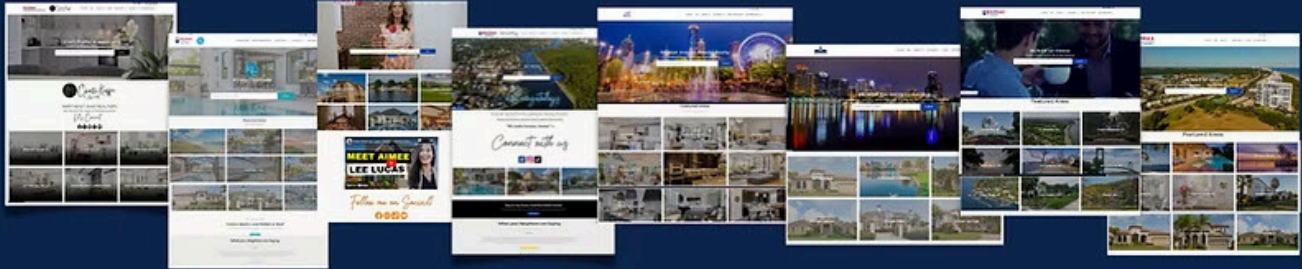
[socialmarketingnut.com](http://socialmarketingnut.com)



# MAXTECH<sup>SM</sup>

powered by **B** BoldTrail

## agent resources



Visit my resource page with videos, tips, hacks, blogs & more

Links for training, videos to get you started.  
Advanced Quick Tutorials, 1:1 Coaching & More!

# boldtrailearning.com

### Powering Up Automations

TUESDAYS @ 11:00am PT

Learn effective strategies to nurture and convert leads around the clock in this webinar.

[Register Here](#)

### Generate New Leads: Free vs. Paid Options

MONDAYS @ 1:00pm PT

Join this webinar to learn how to generate fresh leads and seamlessly funnel them into BoldTrail.

[Register Here](#)

### "Ask Me Anything" - Talk with a Trainer

TUESDAYS @ 12:00pm PT

Pop into this open "office hour" session to talk with a trainer about any tool in BoldTrail.

[Register Here](#)

### How it Works for Agents

Join us as we introduce you to your new MAXTECH powered by BoldTrail.

[Register Here](#)

### Introduction to Folio for RE/MAX

Discover how Folio streamlines transactions and boosts productivity; learn how to integrate it into your workflow and activate your RE/MAX account.

[Register Here](#)

### Build Your Pipeline

MONDAYS @ 11:30am PT

Join this webinar to discover three simple ways to build your pipeline and add contacts effortlessly.

[Register Here](#)



Join your peers on Facebook - almost 15k members

[facebook.com/groups/remaxtechtools](https://facebook.com/groups/remaxtechtools)

# boldtrailearning.com

## SYSTEM ACTIVITIES & HOMEWORK

### SESSION 1 (DASHBOARD):

- Complete Checklist for class
- Do a saved search for organizing your database (example, no Bday, no address, no market report, etc).
- Upload at least 100 Contacts

### SESSION 2 (WEBSITE):

- Complete Checklist from class
- Create a Content Page
- Create a Blog

### SESSION 3 (MARKETING):

- Complete Checklist from class
- Create your own e-mail template
- Send a Mass e-mail

### SESSION 4 (LEAD ENGINE):

- Complete Checklist from class
- Create Squeeze Page
- Create Text Code
- Create Landing Page

## PROFILE - DASHBOARD SETTINGS

### Dashboard & Profile

- Profile / MAXCenter Profile - Title, social, website, mobile #
- Profile & Settings (signature, email, social, etc)
- Download Apps (CRM + Mobile App)

### Marketing Automations:

- Market Report & Listing Valuation Settings
- Behavioral Automation Settings
- Smart Campaigns, review & turn on
- Send Mass E-mails form - Fill out form

### Lead Engine:

- Bulk Import - Upload Contacts or let them do it for you
  - We HIGHLY recommend meeting with a Lead Configuration Specialist (It's FREE)
- Lead Dropbox - Sync 3rd party lead sources

## CRM - CLIENTS JOURNEY

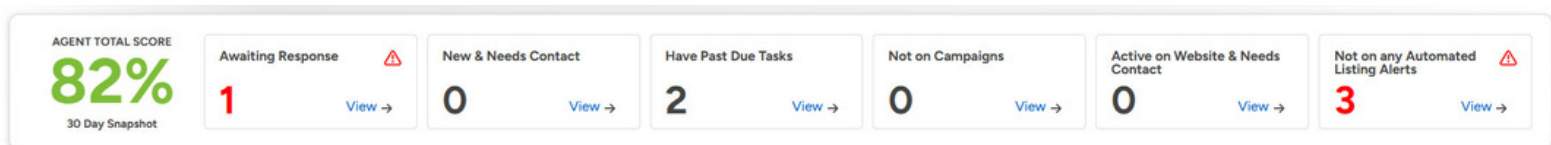
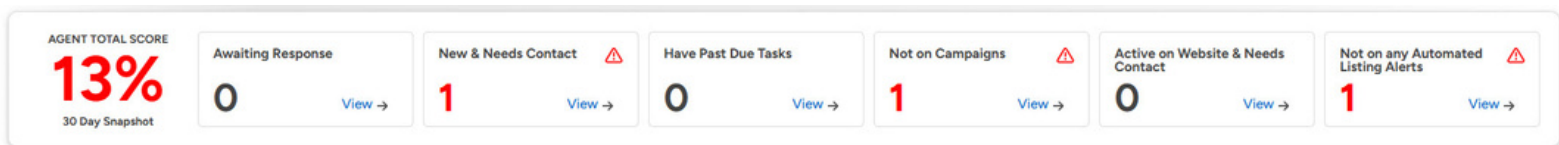
### CRM - Get yourself Organized

- Do saved searches for better organization
- Use hashtags to lable & organize

### GENERAL GUIDE

- SPHERE - Friends, Family, Referral Connections
- PROSPECT - 6+ months out
- NEW LEAD - Not yet communicated with
- ACTIVE LEAD - 3-6 months from move
- CLIENT - Agreed to work with you or less than 3 months out
- CONTRACT - Client who signed agreement
- CLOSED - Closed on real estate transaction and needs long-term follow up

### WHAT IS YOUR VITALS SCORE?



Improve your Vitals Score by completing open tasks!

## WEBSITE SETTINGS & CUSTOMIZATION

### Web & IDX Settings

- Templates - Check them out
- Secondary Logo & Header photo/video
- Forced Registration Settings
- Listings (Types to display on website)
- Listing Carousel
- MLS De-Duplication (if applicable)

### Website Content:

- Site Content - Add manual reviews, sync Zillow
- Site Content - Add Areas (SEO Optimization)
- Widgets for Home Page
- Pages (Content - Categories)
- Blog
- Navigation / Menu Bar



## MARKETING TOOLS

### Marketing:

- Smart Campaigns - Add, review, or edit
- Smart Campaigns - Create e-mail template
- Adding Tokens (sharing)
- Schedule Mass e-mail
- Present - Set up profile & template pages
- Listing Playbook

### Present:

- Set up Presentation Template, About Me, Testimonials, colors, logos, etc
- Choose slides you want to include, rearrange the default order you like them to appear.

### Social Automation:

- Listing Automations - Create Marketing Kit, Connect Social (optional)
- Social - Settings, choose categories, holidays, days of the week and Connect Facebook & LinkedIn (optional).

## LEAD ENGINE TOOLS:

### Lead Engine:

- Squeeze Pages
- Landing Pages (can also use content page template)
- Call & Text Capture
- Listing Playbook - Use Squeezepage link for promotions (take it up a level and convert that link to custom rem.ax url) and use for all promotions for extra tracking, qr code, etc.

### Marketplace:

- Vanity Domain
- Lead Concierge



# BOLDTRAIL BLUEPRINT

20 MINUTES A DAY

WORKING IN YOUR BUSINESS



## 20 MINUTES A DAY WORKING IN YOUR BUSINESS “BREWING TO SUCCESS”

### Here are some ideas

- **Daily:** Look at recent activity, new leads, texts, hot leads, CMA views, etc
- **Daily:** Complete tasks & daily email work throughs
- **Daily:** Filling in the blanks for your saved contact filters
- **Daily:** Complete Missing Activities from your Vitals Score
  
- **Weekly:** Send 5 CMA's to Closed Clients, add #CMAyear (ex: CMA2025) to clients as you send to them. (Do a saved filter for “closed” status without #CMA2025 to give you a list of contacts to send to.
- **Weekly:** Add a local blog to your website or content addition (use chatGPT for help)
- **Weekly:** Create e-mail template (part of a custom drip you are building on)
  
- **Monthly:** Create & Schedule Monthly e-mail Newsletter with Featured listings, local events, blogs you have done, local market report, National housing report, etc.
- **Monthly:** Schedule upcoming Holiday e-mails to your database.
- **Monthly:** Schedule upcoming Month of weekly squeeze pages & landing pages to your social. (Meta Business suite allows a month of scheduling to your FB business page).



## MONTHLY BLOG IDEAS

## BREWING TO SUCCESS

## Here are some monthly blog ideas

- **RE/MAX National Housing Market Update:** Use the marketing assets available monthly to add monthly National Data, embed the video for a monthly blog.
- **Branded Local Market Snapshot Graphic w/ info from your MLS:** You should already be posting these to social so go ahead and add the graphics, videos and information to a blog, then when you are posting to social, link to blog for all information!

## Seasonal Local Blogs for Holidays

Don't forget to list your favorite places!





- **Monthly** - Generic Real Estate Blog or Homeowner Maintenance Tips for your area
- **January** - Best places to ring in the New Year
- **February** - Romantic Things to do for Valentine's Day
- **March** - Favorite places to celebrate St. Patrick's Day
- **April** - Easter Egg Hunts around town
- **May** - Celebrate Mom's with these top places
- **June** - Top Things to do with Dad to Celebrate Father's Day
- **July** - Top Places to watch Fireworks
- **August** - School Calendar
- **October** - Spooktacular events - Haunted houses, Trick or Treats, etc
- **November** - Ways to give back Local charities for food drives or best places for Thanksgiving dinners
- **December** - Local Parades & Events, Best places to see Christmas Lights.







# MONTHLY BLOG IDEAS

## BREWING TO SUCCESS





### ★ JANUARY - NEW YEAR, NEW REAL ESTATE GOALS

- **"Is 2025 the Year to Buy or Sell? Here's What You Need to Know"**
  -  Lead Capture Idea: Free home valuation tool
  -  Social Media: "Thinking of buying or selling in 2025? Let's make a plan!"
- **"10 New Year's Resolutions for Homeowners & Future Buyers"**
  -  Lead Capture Idea: Homeownership checklist
  -  Social Media: "Which of these resolutions is on your list?"





### ♥ FEBRUARY - LOVE WHERE YOU LIVE

- **"The Most Romantic Spots & Date Ideas in [Your City]"**
  -  Lead Capture Idea: Local business partnerships
  -  Social Media: "Tag someone you'd take to these spots!"
- **"Is It Better to Rent or Buy in [Your Market] Right Now?"**
  -  Lead Capture Idea: Mortgage calculator or rent vs. buy quiz
  -  Social Media: "Are you still renting? This might surprise you..."

### ✿ MARCH - SPRING MARKET & HOME IMPROVEMENTS

- **"Spring Cleaning Tips to Increase Your Home's Value"**
  -  Lead Capture Idea: Free home maintenance checklist
  -  Social Media: "Which of these cleaning tips do you swear by?"
- **"The Spring Market: Why Now is the Time to Sell"**
  -  Lead Capture Idea: Seller guide or free consultation
  -  Social Media: "Thinking of selling? Here's why NOW is the time!"

### 🌸 APRIL - TAX SEASON & FIRST-TIME BUYERS

- **"How to Use Your Tax Refund Toward Buying a Home"**
  -  Lead Capture Idea: First-time buyer guide
  -  Social Media: "Tax refund = home down payment? Let's talk!"
- **"Top 5 Hidden Gem Neighborhoods in [Your City]"**
  -  Lead Capture Idea: Local neighborhood guide
  -  Social Media: "Would you move here? #HiddenGems"



# MONTHLY BLOG IDEAS

## BREWING TO SUCCESS





### MAY - HOME SELLING & OUTDOOR LIVING

- **"How to Stage Your Home for a Quick Sale (Without Breaking the Bank)"**
  -  Lead Capture Idea: Free staging checklist
  -  Social Media: "Swipe for 3 easy staging hacks!"
- **"Best Outdoor Living Upgrades to Boost Home Value"**
  -  Lead Capture Idea: Local contractor referrals
  -  Social Media: "Which backyard upgrade would you love?"


### JUNE - SUMMER FUN & RELOCATION

- **"Moving to [Your City]? Here's Everything You Need to Know"**
  -  Lead Capture Idea: Free relocation guide
  -  Social Media: "Tag someone thinking of moving here!"
- **"Best Summer Activities & Events in [Your Area]"**
  -  Lead Capture Idea: Local events list
  -  Social Media: "Save this for summer fun!"

### JULY - MID-YEAR MARKET & INVESTMENT PROPERTIES

- **"Mid-Year Market Update: What's Next for [Your City]?"**
  -  Lead Capture Idea: Free home valuation
  -  Social Media: "Where do you think the market is headed?"
- **"Should You Buy an Investment Property in 2025?"**
  -  Lead Capture Idea: Investment property consultation
  -  Social Media: "Thinking of investing? Read this first!"

### AUGUST - BACK TO SCHOOL & FAMILY HOMES

- **"Best School Districts & Family-Friendly Neighborhoods in [Your City]"**
  -  Lead Capture Idea: School & neighborhood guide
  -  Social Media: "Parents, this one's for you!"
- **"What to Look for When Buying Your Forever Home"**
  -  Lead Capture Idea: Homebuyer consultation
  -  Social Media: "What's your must-have feature in a home?"



# MONTHLY BLOG IDEAS

## BREWING TO SUCCESS

### 🍁 SEPTEMBER - HOME MAINTENANCE & FALL MARKET

- **"Fall Home Maintenance Checklist: Keep Your Home in Top Shape"**
  - 🎯 Lead Capture Idea: Seasonal home maintenance guide
  - 📱 Social Media: "Are you ready for fall? 🍁"
- **"How to Buy & Sell a Home at the Same Time (Without the Stress)"**
  - 🎯 Lead Capture Idea: Buyer & seller consultation
  - 📱 Social Media: "Buying & selling at once? Here's what you need to know!"

### 👻 OCTOBER - SPOOKY HOMES & REAL ESTATE MYTHS

- **"Haunted Houses & Spooky Real Estate Stories in [Your City]"**
  - 🎯 Lead Capture Idea: Local events & historic home guide
  - 📱 Social Media: "Would you buy a haunted house?" 🧛‍♀️
- **"Top 5 Real Estate Myths You Should Stop Believing"**
  - 🎯 Lead Capture Idea: Homebuyer myth-busting guide
  - 📱 Social Media: "Did you believe #3? 🤔"

### 🦃 NOVEMBER - GRATITUDE & MARKET TRENDS

- **"What's Next for the Real Estate Market in 2026?"**
  - 🎯 Lead Capture Idea: Free market report
  - 📱 Social Media: "What are your predictions?"
- **"How to Host the Perfect Holiday Gathering in a Small Space"**
  - 🎯 Lead Capture Idea: Holiday home decor guide
  - 📱 Social Media: "Save this for holiday hosting tips!"

### 🎄 DECEMBER - YEAR IN REVIEW & HOLIDAY CONTENT

- **"The Biggest Real Estate Trends of 2025 (And What's Coming in 2026!)"**
  - 🎯 Lead Capture Idea: Market trends eBook
  - 📱 Social Media: "Which trend surprised you the most?"
- **"5 Things to Do Before Buying a Home in 2026"**
  - 🎯 Lead Capture Idea: Free homebuyer checklist
  - 📱 Social Media: "Planning to buy next year? Start here!"





# GOALS BY MONTH

DO - DOING - DONE

JANUARY	FEBRUARY	MARCH
APRIL	MAY	JUNE
JULY	AUGUST	SEPTEMBER
OCTOBER	NOVEMBER	DECEMBER

WRITE 3 TASKS FOR EACH MONTH THAT YOU ARE COMMITTED TO DO.

### GET ORGANIZED!

Easily find and organize  
Contacts in CRM

Easily Mass e-mail  
/ txt or schedule  
e-mail by Hashtag  
or search

Upcoming OH,  
Price Reduction,  
New Listing,  
Holidays, Monthly  
Newsletter

Set up smart  
Campaign based  
on Triggers  
(hashtags, status,  
date, etc)

#### CONTACT FORM ON PAGES

All leads will get  
labeled with the  
hashtag you enter  
for easy follow up!

#### PLAYBOOKS

Give you squeeze  
page link, mass e-  
mail to #hashtags,  
label leads with a  
hashtag for that  
property making  
follow up or  
future listing  
announcements  
so easy!

# #hashtag

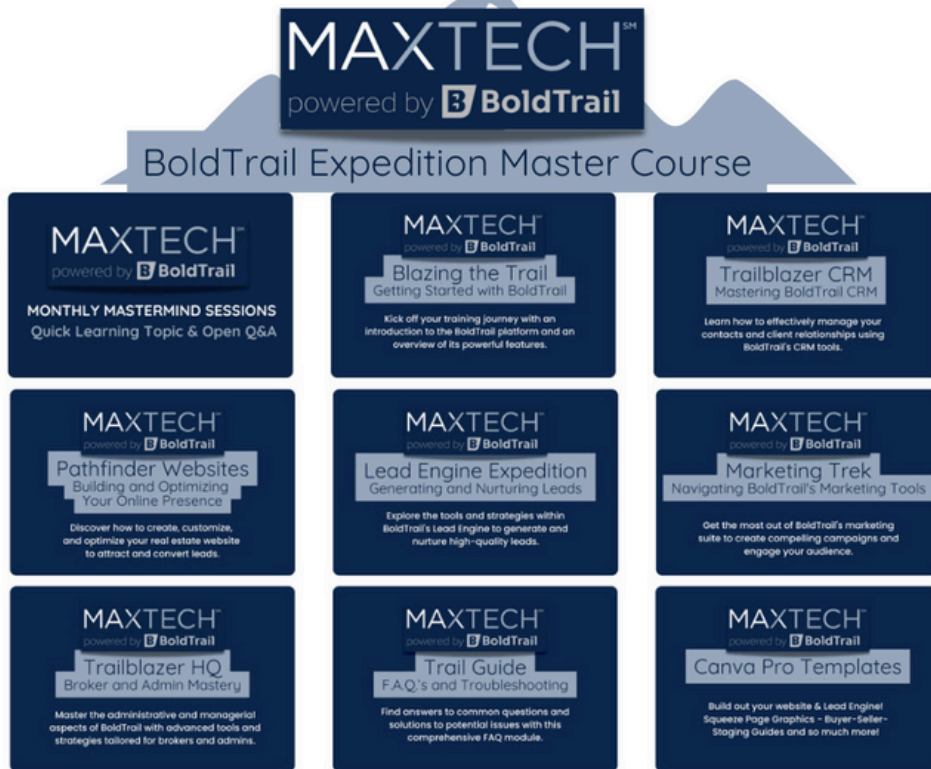
#### SQUEEZE PAGE - LANDING PAGE

All leads will get  
labeled with the  
hashtag you  
enter for easy  
follow up!

#### OPEN HOUSE APP

Turn on OH Smart  
Campaign for auto  
follow up! All  
leads using app  
will get #hashtag  
for that property  
too!

# FULL MASTER COURSE



We have a ton of video tutorials and have them organized inside our BoldTrail Master Course! Easily learn at your convenience with our organized Play-Pause-Do videos organized by categories!

**1:1 Coaching Session with Heather**  
Looking for help with your MAXTECH Powered by BoldTrail Platform? Marketing or Canva Help? Onboarding a new team member and need help training them on RE/MAX Tools? Schedule a 1:1 Coaching Session with Heather!

