# MAXTECH
### powered by BoldTrail

# BoldTrail
### EXPEDITION

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## BoldTrail Expedition

# FULL ONBOARDING CHECKLIST

# BLAZING THE TRAIL
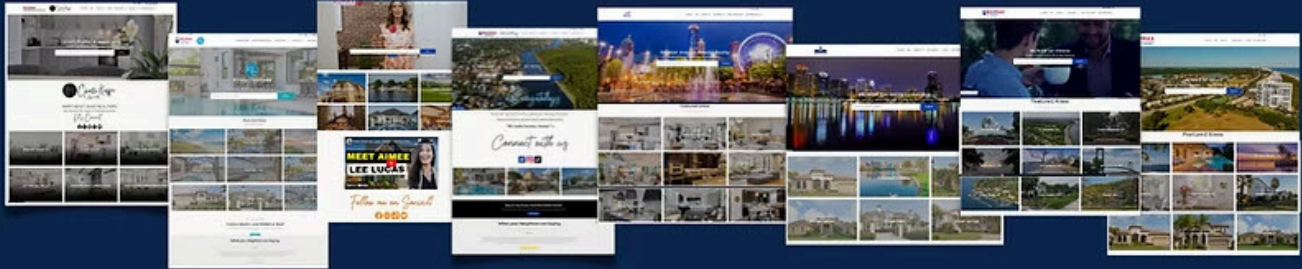
## HEATHER H HOLLIDAY
### Your Marketing & Tech Coach
### socialmarketingnut.com

# MAXTECH℠

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!

# boldtraillearning.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 - over 14.5k members
facebook.com/groups/remaxtechtools

# 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
- ☐ Behavorial 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
- ☐ Lead Dropbox - Sync 3rd party lead sources

## 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 Cities (SEO Optimization)
- [ ] • Widgets for Home Page
- [ ] • Pages (Content - Categories)
- [ ] • Blog
- [ ] • Navigtion / Menu Bar

## 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, rearrage 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) nd use for all promotions for extra tracking, qr code, etc.

### Marketplace:

- [ ] • Vanity Domain
- [ ] • Lead Concierge

## 20 MINUTES A DAY
### WORKING ON 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

- **Weekly:** Send 5 CMA's to Closed Clients, add #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).

Hustle

## GOALS BY MONTH
### DO - DOING - DONE

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

**WRITE 1 TASK FOR EACH MONTH THAT YOU ARE COMMITTED TO DO.**