



MAXTECHSM

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BoldTrail Expedition BOOTCAMP

CLASS WORKBOOK



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Week 1 Homework & Recap:

Dashboard Overview:

- Profile / MAXCenter Profile
 - Title-Social-Info pull from main profile, Mobile Number
- Profile & Settings (signature, email, social, etc)
- Download Apps (CRM + Mobile App)
- Vitals - Agent Success + System Activity + Consumer Interest

Marketing:

- Automations:
 - Market Report & Listing Valuation Settings
 - Behavioral Automations
- Send Mass E-mails form

Contacts:

- Saved Search
- Columns
- Client Journey

Lead Engine:

- Bulk Import
- Lead Dropbox
- Playbooks
- Smart Number

Weekly Homework

- Saved Search
- Uploading Contacts
- Social Post
- Live Class

Week 2 Homework & Recap:

Web & IDX:

- Blog
- Widgets
- Pages
- Templates
- Forced Registration
- Site Content (reviews)

Website Content:

- SEO (Search Engine Optimization)
- Navigation (Category vs Page)
- Content Page vs Link
- Add KCM Blog Page

Weekly Homework

- Content Page
- Blog
- Social Post
- Live Class

WEEK 3 HOMEWORK & RECAP:

Explore Your Marketing Tools:

Marketing:

- Smart Campaigns - Create e-mail template
- Adding Tokens (sharing)
- Send Mass e-mail
- Hashtag Management
- Present Set Up (CMA & Buyer Tour)

Social Automation:

- Listing Machine
- Social
- Design Center

Weekly Homework

- Send Mass email
- Create your Own e-mail Template
- Social Post
- Live Class

WEEK 4 HOMEWORK & RECAP:

Expore Lead Engine Tools:

Lead Engine:

- Squeeze Pages
- Landing Pages (can also use content page template)
- Call & Text Capture

Marketplace:

- Vanity Domain
- Lead Concierge

Weekly Homework

- Create Squeeze Page Link
- Create Landing Page
- Create Call/Text Capture
- Social Post
- Live Class

BONUS ACTIVITIES:

- Complete Agent Quick Start Course - 5 pts
- Run a Property Boost 2 pts
- Send a CMA and add #CMAaday to client - 1 pt each
(up to 10 per course)

TIE BREAKER - IN THE EVENT OF A TIE, WE WILL BE ON THE LOOKOUT FOR AN OVERACHIEVER

- Reviews added to website
- Widgets on Website
- Secondary Logo on website
- Header photo / video updated on website
- Scheduled e-mails

NOTES

