

MAXTECHSM

powered by **B** BoldTrail

B o l d T r a i l

E X P E D I T I O N

MAXTECHSM

powered by **B** BoldTrail

BoldTrail Expedition

FULL ONBOARDING CHECKLIST



HEATHER H HOLLIDAY

Your Marketing & Tech Coach

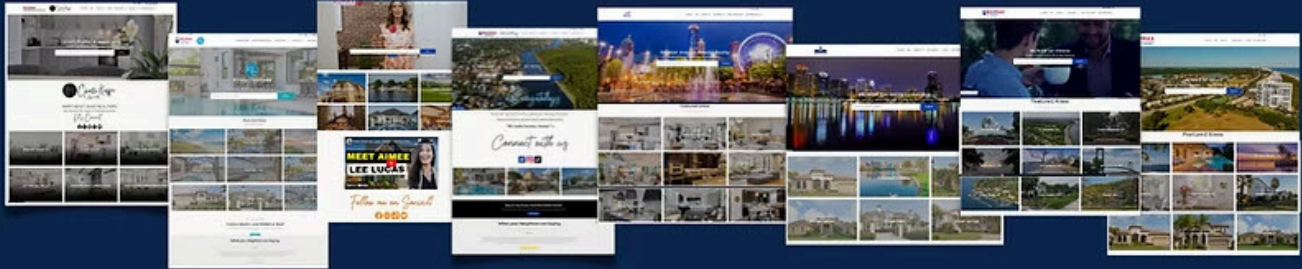
socialmarketingnut.com



MAXTECHSM

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agent resources



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

socialmarketingnut.com/boldtrail-resources



Join your peers on Facebook - over 14k members
facebook.com/groups/remaxtechttools

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](#)

Full training course with videos, tips, hacks & more
boldtrailexpedition.com

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
- 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
- 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

**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).



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.