

A woman with dark hair in a ponytail, wearing glasses and a black blazer over a white polka-dot shirt, is looking down at a tablet computer. She is standing near a large window with a view of a city. The background is slightly blurred.

TECHNOLOGY
PLANNER

**RRREADY.
SSSET.
GO!**

Master RE/MAX[®] technologies.

Develop effective work habits.

Form professional best practices.



TECHNOLOGY PLANNER

This planner provides bite-sized activities that you can schedule throughout your week.



MAX/Center® is the hub that provides access to all RE/MAX services, support, news and technology. This is also home to your MAX/Profile, where critical information related to your online brand, MLS and service areas are configured. Every agent should follow these exercises at least once!

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MINUTES

SET UP YOUR MAX/PROFILE

Your MAX/Profile is your virtual self. Set up your profile to ensure your listings appear on remax.com and that you receive relevant leads.

- ☐ Enroll in the **Setting Up + Personalizing Your Profile course (rem.ax/3JbQ7KI)**.
- ☐ Upload a headshot.
- ☐ Complete your profile.
- ☐ Confirm your MLS ID(s) and Service Areas are correct.

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MINUTES

DISCOVER CORE APPS

Visit each of the following resources, which provide valuable information and productivity tools.

- ☐ RE/MAX University®
- ☐ RE/MAX MarketplaceSM
- ☐ booj (where available)
- ☐ Support Services
- ☐ Tech News
- ☐ RE/MAX Hustle
- ☐ MegaphoneSM by RE/MAX
- ☐ Marketing Portal

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MINUTES

DISCOVER THE RE/MAX REFERRAL NETWORK

Discover the **RE/MAX Referral Network course (rem.ax/3pkPuGC)**.

- ☐ Practice: Find an agent in your home town, an office near your favorite resort and at least one peer in a country you'd like to visit someday.

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MINUTES

REM.AX URLS

Create easy to remember links with the **URL Shortener (remax.net/shortener)**.

- ☐ Shorten lengthy URLs for your RE/MAX App, single listing websites and other online promotional materials.

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MINUTES

DO IT DAILY

The MAX/Center home screen provides easy access to top articles and your favorite apps.

- ☐ Bookmark **remax.net** and visit as a part of your daily routine.



Stay in the loop with news, resources and updates from RE/MAX, then use MAX/CenterGO® to share your expertise and connect with other RE/MAX professionals from around the globe.



GET ORIENTED

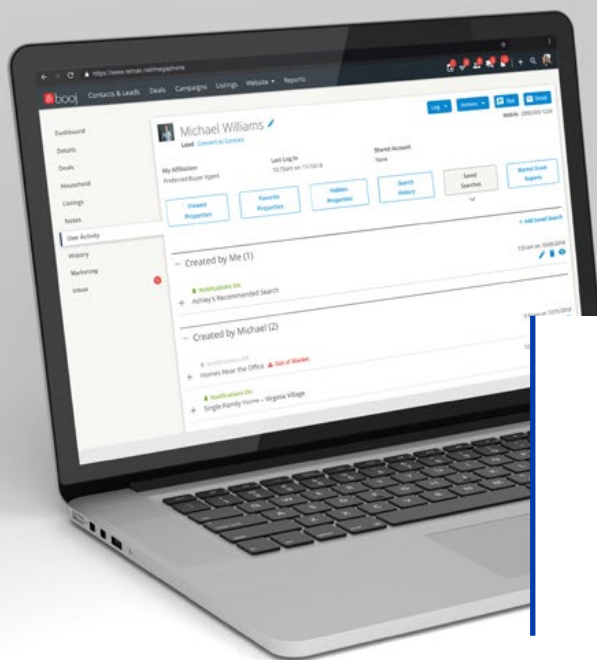
- ☐ Install the app: Search for “MAX/CenterGO” in the **Google Play** or the **Apple App** stores.
- ☐ Learn about **The Mobile Experience (rem.ax/go_mobile)**.
- ☐ Get jazzed up by watching the **Introduction video (rem.ax/introducing_go)**.
- ☐ Know when someone has posted or responded to one of your posts. Learn how to **Configure Notifications (rem.ax/go_notifications)**.
- ☐ You can use GO on the web, too! Visit **go.remax.net**.



ALL ABOUT CATEGORIES

- ☐ See how to **Filter Content with Categories (rem.ax/go_categories)**.
- ☐ Open the app and click into your categories. Observe how they filter the news feed.
- ☐ Manage your subscriptions. Subscribe/unsubscribe to categories based on your interests.
- ☐ Like at least 2 posts.
- ☐ Comment on at least one post that catches your attention.
- ☐ Learn how to create a post by watching this **Short Tutorial (rem.ax/3Je2mWV)**.
- ☐ Create your first post! Visit MAX/CenterGO then ask a question or share one of your wins!

SEE YOU ON THE GO!



The Customer Relationship Manager (CRM) is the heart of the booj Platform. The CRM provides powerful tools that enable you to organize and engage with your contacts and leads. Use booj to manage your relationships, track your production and stay on top of all your day-to-day activities.



MAX/PROFILE CHECKUP

Before getting started with booj, give your MAX/Profile a check-up.

- ☐ Watch the **Setting Up + Personalizing Your Profile video (rem.ax/3sslwkC)**.
- ☐ Upload a headshot.
- ☐ Complete your profile.



GATHER YOUR DATABASE

Download your contacts and leads from your old CRM. This is a great time to separate your contacts into groups.

- ☐ Work through the **Adding + Removing Contacts Into Your CRM course (rem.ax/3plu3VF)**.



TOUR BOOJ

Visit RE/MAX University for a comprehensive overview of the CRM.

- ☐ Go through the **Getting Started: Setting Up Your booj Account course (rem.ax/3yViPdZ)**.
- ☐ Log in to booj and complete the setup wizard.



GO ON A SETTINGS SCAVENGER HUNT

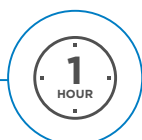
Enroll in the **Setting Up Your booj Account courses (rem.ax/3Frtzmz)** and then take the tour yourself. Enter the booj settings area through the menu under your profile picture and explore each of the following:

- ☐ **Notification settings:** Activate text, email or push notifications for different events.
- ☐ **Integration settings:** Connect booj to third-party lead sources, communication tools or transaction management services.



GO ON A SETTINGS SCAVENGER HUNT (CONT'D)

- ☐ **Offered leads settings:** collect no-cost leads from remax.com and other booj-powered websites once your zip codes are inside booj.
- ☐ **Email and messaging settings:** create personalized email templates you can use throughout the CRM.
- ☐ **Configure email signature:** select the primary signature you want to use in your email messages.



FOCUS ON CONTACTS AND LEADS

In the Resource Center, which you can access by clicking the blue question mark within booj, find the how-to guide for “Viewing Leads and Contacts” and take the guided tour. After the tour, practice what you’ve learned! Some suggestions:

- ☐ Use the name filter to search for a specific contact.
- ☐ Add and remove columns from the list – there are plenty to choose from! Arrange them in a way that seems useful to you and save the view for later use.
- ☐ Look up one of your active contacts and explore every part of their record. If they are married or in a relationship, connect them to their partner to form a household.

NOTE: Don’t forget to reset your filters.



SET UP TASKS

Create a checklist of your usual processes now so you will be ready to automate your processes within the platform later. Document the steps you take each time you:

- ☐ Engage a new lead.
- ☐ Sign with a new buyer or seller.
- ☐ Follow-up after a deal closes.



DEAL MANAGER

- ☐ Take the **Getting Started with Your booj Deal Manager course (rem.ax/30WEzti)**, then set up your current deals.



FIND OPPORTUNITIES FOR OUTREACH

- ☐ Schedule a little time each day to update your contact records. Start with your current business, then recent closes. The **First app** can help you prioritize your outreach!
- ☐ Form households and fill in the details as you go along. Make a goal to review at least 5 contacts each day.



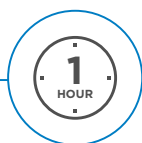
OVERVIEW - CREATING A BOOJ AGENT WEBSITE

- ## START WITH RESEARCH TO EXPAND YOUR WEBSITE

- ☐ Describe your niche: Write down what is unique or attractive about each neighborhood or community you serve.
- ☐ Visit your Convention and Visitors Bureau and other community associations to find videos and resources that may help promote your message.
- ☐ Collect photography and written content you've published elsewhere.

CREATE CONTENT

- ☐ Create a new page that highlights the charm of one or more neighborhoods. Show key attractions, video and photography. The saved search content block is a great way to present relevant listings for that neighborhood.
- ☐ Set a goal to create and publish one or two community pages per week.
- ☐ Use the social media block to include posts from Facebook, Pinterest and other platforms on your homepage.



REVIEWS AND TESTIMONIALS

Reviews and testimonials are a great way to establish your reputation online. Check your online presence at Zillow, Yelp and other sites, then archive any new reviews in an offline document. Zillow reviews can be presented on your site using the Zillow Review content block. If you would prefer more control, type your reviews into the website content manager and present them with the Testimonial block.

- ☐ Take the **Adding Content Blocks to Your Website course (rem.ax/3qjLeq0)**.
- ☐ Set a recurring reminder to review your online ratings every month or two.



DEEP DIVE - CUSTOM DOMAIN NAMES

Once your site is online, you can further personalize it with an optional Custom Domain Name.

- ☐ Take the **Getting Started with Your Website course (rem.ax/3H57BGz)**.
- ☐ Include your new website URL in your MAX/Profile and other platforms such as LinkedIn, professional organizations, your Facebook page, etc.



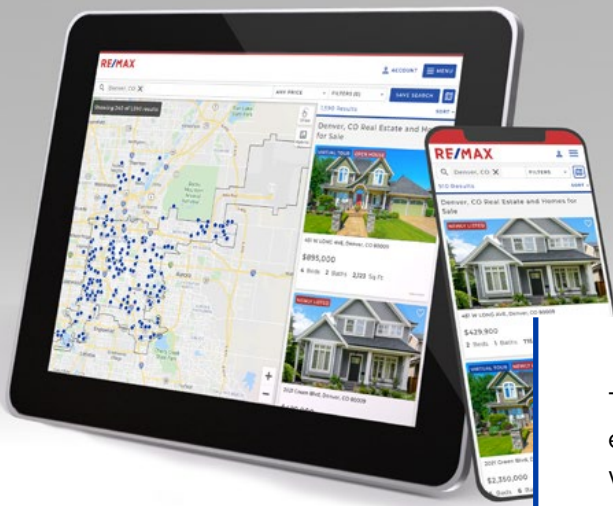
CREATE LANDING PAGES WITHIN YOUR WEBSITE

- ☐ Create new pages to promote individual listings or community events. Exclude them from your site menu to use them as landing pages.
- ☐ Link to the landing page in online advertising, social posts and other promotions.



MAINTAIN YOUR MOMENTUM

- ☐ **Daily:** Invite contacts and leads to try your search app.
- ☐ **Monthly:** Check your online reviews and testimonials.
- ☐ **Seasonally:** Update your photography, video tours and community pages.
- ☐ **Annually:** Review your profile information, consider an updated headshot and review competing websites. Is your site up-to-date and relevant in your local market?



REAL ESTATE SEARCH APP

The RE/MAX Real Estate Search App provides a sleek and effective home search experience. The app provides agents with new leads, information about their clients' searches and a streamlined home search experience. Think of it as the perfect mobile companion to your agent or team website.

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MINUTES

EXPERIENCE THE RE/MAX APP IN ACTION

Understand your client's experience of your app.

- ☐ Visit remax.com and create a consumer account for yourself, then install the app from remax.com.
- ☐ Browse through the menu and search for your office, or your own profile within the app.
- ☐ Take the [Consumer Search Tools course \(rem.ax/3qjLo08\)](https://rem.ax/3qjLo08).

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MINUTES

BRAND THE APP

The RE/MAX App provides powerful branding and communication tools for the Preferred Buyer's Agent (PBA).

- ☐ Go through the [Branding and Marketing: The RE/MAX Mobile App course \(rem.ax/3ei1mTt\)](https://rem.ax/3ei1mTt), then brand the app installed on your device.

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MINUTES

SEE THE CONNECTION

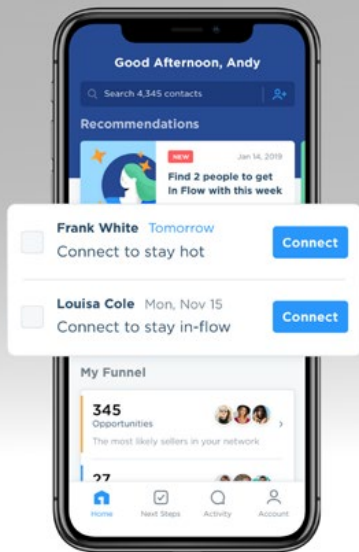
The app will relay useful information about your client's home searches to your CRM.

- ☐ Use the app to save a few searches, mark favorites, then try the "Contact My Agent" features.
- ☐ Give the system a few minutes to transfer the data, then review how these activities appear in the User Activity tab on your corresponding CRM contact record.
- ☐ If you love it, rate it on the [Apple App](#) or [Google Play](#) stores! Authentic positive reviews will help build confidence and encourage downloads. If you encounter any problems, please contact Product Support so your concerns can be promptly addressed.

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MINUTES

PROMOTE THE APP TO YOUR CLIENTS

- ☐ Include a link to the app in your new client email template or share the [RE/MAX App PDF \(rem.ax/2Cf4Ypq\)](https://rem.ax/2Cf4Ypq) at your first meeting.
- ☐ Set a goal to share your app with 15 new people each week.



First® identifies friends, family and acquaintances who appear more likely to sell their home within the next 12 months. Agents who organize and connect with these contacts using the app can uncover likely sellers among the people they already know.

1
HOUR

SIGN UP

Getting started is easy.

- ☐ Sign up at **first.io**.
- ☐ Walk through the startup wizard.
- ☐ Sync your phone and email contacts directly through the app, then upload the contacts from your CRM so First can begin analyzing your network. First is wholly owned by RE/MAX and we are committed to keeping your data safe.

1
HOUR

FAST TRACK TO FIRST

- ☐ While First analyzes your sphere, take the **First | Getting Started course (rem.ax/3ssOimi)**.

5
MINUTES

ORGANIZE

Find 5 to 10 minutes each day to review recommendations and make connections.

- ☐ Identify and label a few of your past clients.
- ☐ Review your opportunities list, then follow up with 3-5 people every day.
- ☐ As you reconnect and discover potential deals, add them to your funnel.
- ☐ Also use this time to label contacts, identify other agents or hide unwanted contacts.

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TRACK SUCCESS

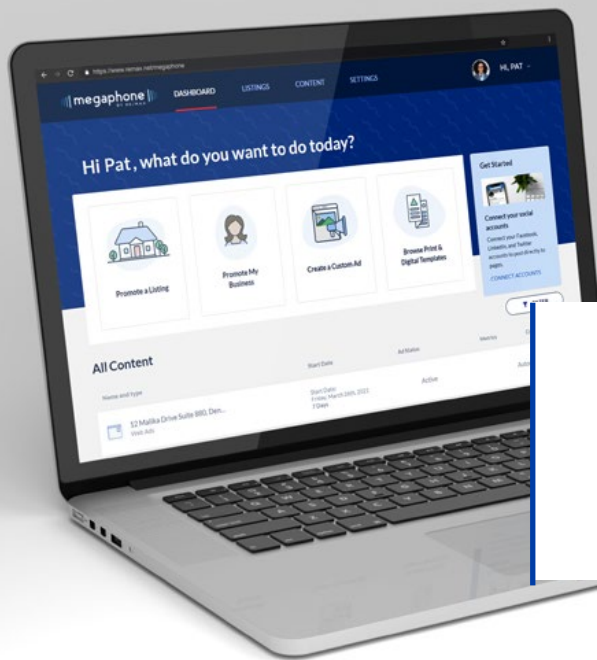
Add up the value First creates for your business. A single completed transaction will more than pay for the following 12-month subscription!

- ☐ Track your conversations and completed transactions.

Need inventory? First identified over 33,000 listings for RE/MAX agents in 2020.²

Using First only takes a few minutes each day. Agents win an average of 8 listings in their first 3 months of using First.³

View the deals you won and the deals you lost. Agents who use First are on average 50% more productive than agents who don't.⁴



Promote your business and generate leads with this unified marketing and advertising platform. Efficiently promote your brand, build marketing materials and advertise listings—through digital or print—whether at your computer or on the go.

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MINUTES

MEET MEGAPHONE

Find out what Megaphone is all about:

- ☐ Download and read the **Megaphone Marketing flyers (rem.ax/3JlbVxB).**
- ☐ Review the **Megaphone FAQ (rem.ax/3eRHbvO).**
- ☐ Sign in and look around **megaphone.remax.com.**

1
HOUR

COMPREHENSIVE TRAINING

If you prefer to learn everything at once, settle in for a deep dive that covers everything you need to know to master Megaphone:

- ☐ Take the **5 Steps for Setting Up Your Account course (rem.ax/3Ji8rBQ).**

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MINUTES

FEATURE OVERVIEW

If you prefer a summary, this video provides a concise tour of Megaphone's key capabilities:

- ☐ Watch the **Why Megaphone video (rem.ax/32eTglY).**

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MINUTES

AUTOMATIC LISTING PACKETS

Megaphone automatically generates promotional material for each new listing, open house and price reduction.

- ☐ Take the **Promoting My Listing Through Automation course (rem.ax/3yXzX2v).**

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MINUTES

ORGANIC SOCIAL MEDIA

Share listings with your online followers with free social media posts.

- ☐ Follow the instructions in the **Promoting My Listing for Free on Social Media course** (rem.ax/3Fs9gp7).
- ☐ Visit any listing in the platform to broadcast a new listing, open house or price reduction to all your real estate fans.

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MINUTES

MARKETING TEMPLATES

Create beautiful marketing materials through the Megaphone Content Library.

- ☐ Take the **Promoting My Listings Through Printable Marketing course** (rem.ax/3emL37I). Select and download any promotional PDF.
- ☐ Locate where to purchase prints or configure a direct mail campaign.

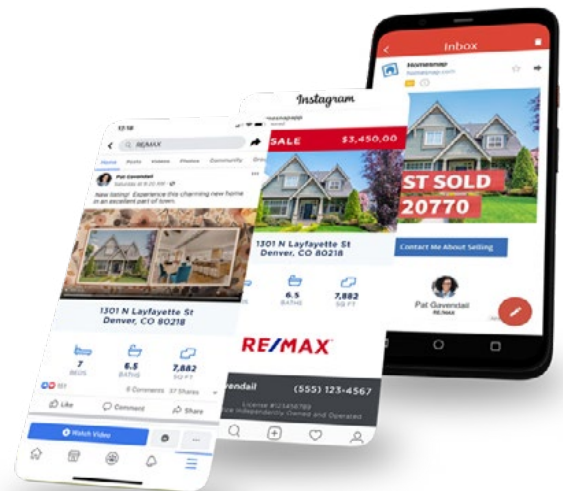


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MINUTES

ADVERTISING BASICS

Megaphone makes it easy to create lead-generating digital ad campaigns. Watch the short videos in **Promoting My Listing Using Website Ads** (rem.ax/33zWJIF) to learn how to:

- ☐ Advertise online.
- ☐ Target ads by geography.
- ☐ Promote your business.

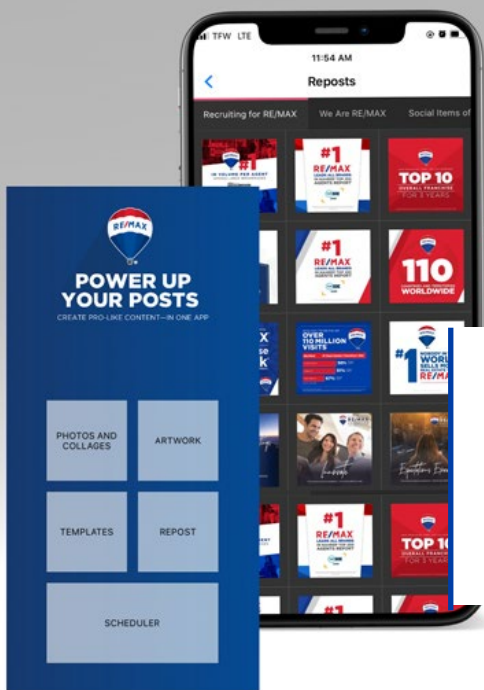


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MINUTES

PROMOTIONAL AUTOPILOT

Listing packets already come to you automatically, but you can also instruct Megaphone to run ads or create free listing posts on your social pages.

- ☐ Watch the **Listing Automation Setup video in the Automated Listing Marketing course** (rem.ax/3ely06E).



Attract new clients while staying connected with the ones you already have! Create professionally branded content for your social media and digital channels from a library of customizable and simple-to-use templates.

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MINUTES

DISCOVER PHOTOFY

- ☐ Watch the **Creating an Account video in the Photofy | Getting Started course** (rem.ax/3eTYvjQ) to learn how to set up your account.
- ☐ Install the Photofy app and sign up ([Google Play - rem.ax/3pWAf75](https://play.google.com/store/apps/details?id=com.photofy)) ([Apple App - rem.ax/3sWRJSE](https://apps.apple.com/us/app/photofy/id1444444444)).

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MINUTES

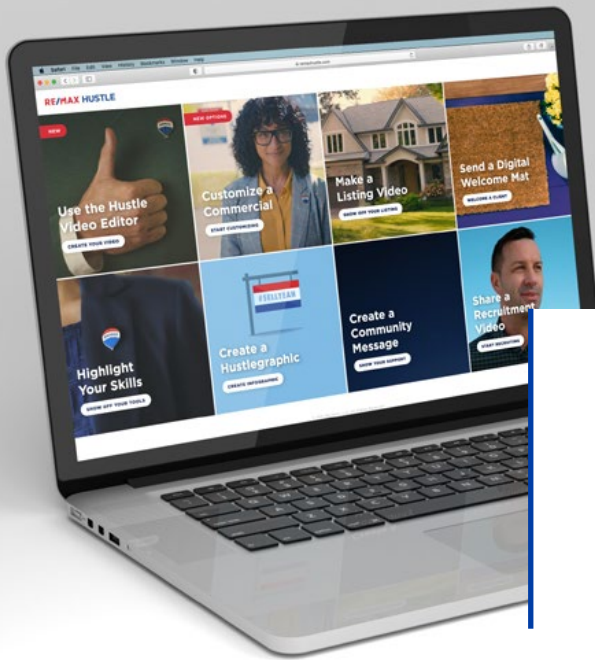
DEVELOP A ROUTINE

- ☐ Take a photo every time you enter a home and write a constructive post about the experience. Show off your staging, great landscaping, favorite architectural feature or other noteworthy aspect of the visit.
- ☐ Fine-tune your message by taking time each week to review which of your posts gathered the greatest response and which were ignored. You can schedule posts to appear at different times throughout the week for maximum effect.
- ☐ Explore new hashtags to discover new communities. Think of ways to improve your imagery, templates or wording.
- ☐ Engage your peers! See who in your office can get the most likes on a post. Have a contest and choose a fun prize for the winner. Compare responses to tagged posts and start a bulletin board. Who can collect the most likes?

15
MINUTES

AMPLIFY YOUR POSTS

As your confidence and audience builds, you'll use Photofy to create effective web ads for **Megaphone by RE/MAX!**



RE/MAX[®]
HUSTLE

Impress leads and delight your clients when you share personalized world-class video. Visit remaxhustle.com on your desktop or mobile device to enhance your advertising, webpages, listing presentations and more—do it all in just a few clicks, and at no additional cost to you!

EVERYTHING ON REMAXHUSTLE.COM IS SELF-EXPLANATORY, JUST JUMP IN AND PLAY!

Watch the **Creating Videos + Digital Graphics course (rem.ax/3EnLZDw)** and complete the tasks below.

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MINUTES

- ☐ Customize a RE/MAX commercial. Use your commercial in a Megaphone ad campaign or simply share it on social media.

5
MINUTES

- ☐ Create a listing video. Upload up to 3 photos and choose 3 features of your new listing, then your work is done. Share the video on your Facebook page.

5
MINUTES

- ☐ Show off all your capabilities with a video. Mix and match your choice of RE/MAX benefits to appeal to buyers and sellers, or just to promote yourself. A how-to video is provided to get you started!

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MINUTES

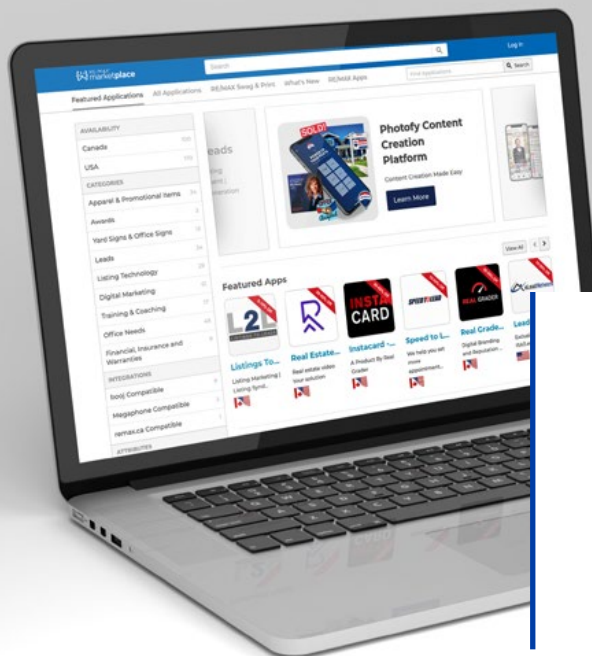
- ☐ Create your mini-masterpiece with the video editor. Record or gather a video clip and at least one photograph. The Hustle Video Editor is an easy way to combine your own clips and high quality images with stickers, text and music.

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MINUTES

- ☐ Create a Hustlegraphic. Quickly combine a few key stats about your past year into a fun infographic. Download and share the graphic on social media or your website.

2
MINUTES

- ☐ Roll out a virtual welcome mat. A perfect accompaniment for a closing gift or thank-you message. Share it with one of your recent clients.



RE/MAX MarketplaceSM gives busy broker/owners, team leaders and agents immediate access to quality tech, tools and suppliers. Our staff of personal shoppers have done all the research for you, so when you shop Marketplace you only see Approved Suppliers that are real estate focused and live up to RE/MAX[®] standards.

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MINUTES

DISCOVER AGENT ESSENTIALS

- ☐ Take the **Getting Started with Marketplace course (rem.ax/3pm3ik0)**, then practice navigating Marketplace.
- ☐ Explore the categories. Locate suppliers for business cards, yard signs and listing photography.
- ☐ Use the search bar to find the product pages for First[®], Photofy[™] and Hurdlr.

5
MINUTES

HOW TO BUY, INTEGRATE OR ACTIVATE

For many products you will be directed to the approved supplier's website to complete your purchase, while you'll buy technology integrated with RE/MAX data directly from Marketplace.

- ☐ Watch the **Purchasing an App video in the Getting Started with Marketplace course (rem.ax/3pp9RCC)**.

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MINUTES

EASY LICENSING FOR BROKER/OWNERS AND TEAMS

RE/MAX Marketplace helps make it easy to manage software for an entire team or office.

- ☐ Take the **What Brokers Need to Know course (rem.ax/3pnbGQp)**.

WHY SHOP MARKETPLACE?

We won't waste your time with low quality inventory.

RE/MAX evaluates dozens of potential suppliers each month and only those that meet our strict criteria are invited to join Marketplace.

Cash in on automatic discounts.

Shop Marketplace to instantly qualify for any special offers and free trials that were negotiated on your behalf.

Level up with connected tech

The unique Marketplace version of some applications can do things like automatically save leads into your CRM, add interactivity to your agent or team website or work with your customized listing information.

Whatever you need to buy, start with RE/MAX Marketplace.



technology

PRODUCT SUPPORT

Have tech questions? We have answers!

Text, call, live chat or email the team directly. Expert solutions and answers to common questions are also available via the RE/MAX eCare Help Center.



TEXT OR CALL

1.888.398.7171



EMAIL

productsupport@remax.net



LIVE CHAT

Support Services
MAX/Center Tile

¹Availability is limited to U.S. where booj is available. MLS agreements are required before a booj website can be published. ²Not all listings were awarded to RE/MAX Agents.

³Average of total productivity for RE/MAX agents who began using First in 2020, including some agents who may have had higher than average baseline productivity prior to use of the First app. ⁴Comparison of transaction sides for RE/MAX agents using the First app to transaction sides for RE/MAX agents who are non-users with similar individual/team relationship composition, within the same RE/MAX office, March-December 2020. Some agents who use the First app may have had higher than average baseline productivity prior to use of the First app than non-users of the app.