

RRREADY. SSSET. GO!

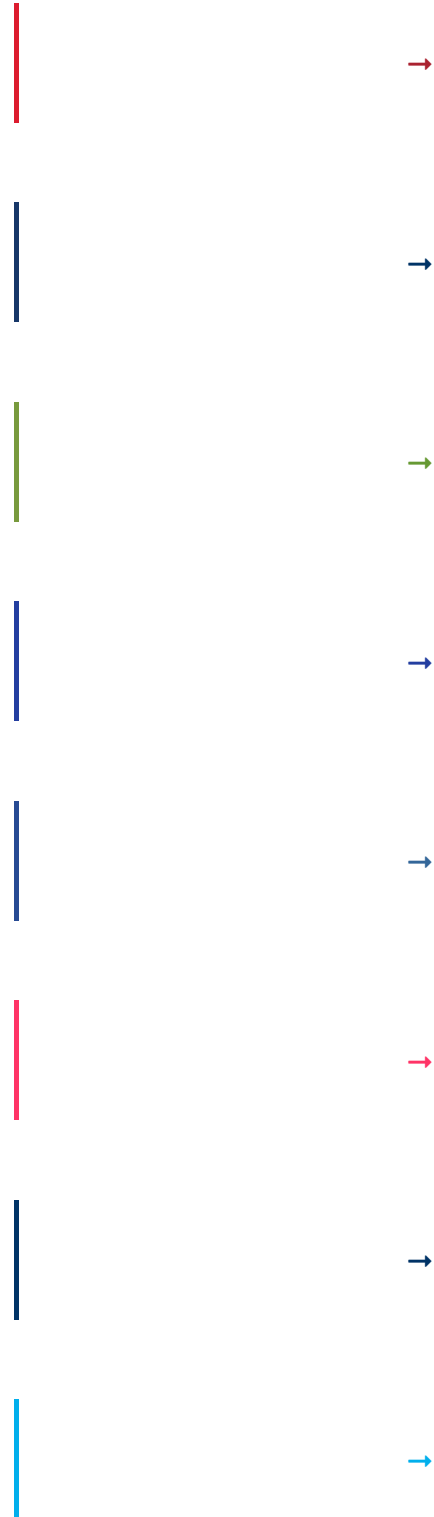
Master RE/MAX[®] technologies.

Develop effective work habits.

Form professional best practices.

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

[Click an application to get started.](#)





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!



SET UP YOUR MAX/PROFILE

Your MAX/Profile is your virtual self and is important to have set up to ensure your listings appear on remax.com and you receive leads.

- Watch the **Profile Overview Video** (rem.ax/2CefpK3).
- Upload a headshot.
- Complete your profile.
- Confirm your MLS ID and Service Areas are correct.



DISCOVER CORE APPS

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

- RE/MAX University®
- Megaphone™ by RE/MAX
- Marketing Portal
- Support Services
- Shop RE/MAX
- booj (where available)
- Design Center
- Tech News
- RE/MAX Hustle



DISCOVER THE RE/MAX REFERRAL NETWORK

Become familiar with the **Network Tool** (rem.ax/38PgrIJ), then try it out.

- 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.



REM.AX URLS

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

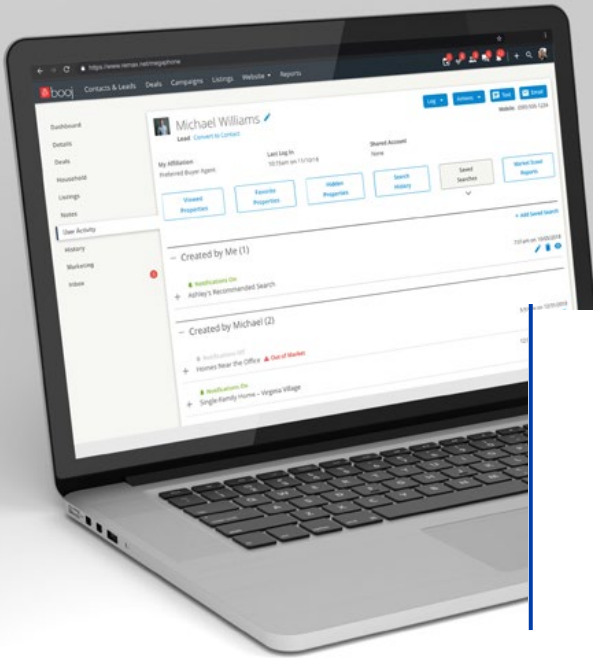
- Shorten lengthy URLs for your RE/MAX App, single listing websites and other online promotional materials.



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.



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.

1
HOUR

MAX/PROFILE CHECKUP

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

- Watch the **Profile Overview Video (rem.ax/2CefpK3)**.
- Upload a headshot.
- Complete your profile.

1
HOUR

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 **Contact Cleanup Exercise (rem.ax/321aW8f)**.

1
HOUR

TOUR BOOJ

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

- Watch the **booj Beginner webinar (rem.ax/3iC6vXg)**.
- Log in to booj and complete the setup wizard.

1
HOUR

GO ON A SETTINGS SCAVENGER HUNT

You can customize booj to work the way you want. 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.
- Offered leads settings:** collect no-cost leads from remax.com and other booj-powered websites once your zip codes are inside booj.



GO ON A SETTINGS SCAVENGER HUNT (CONT'D)



- 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.



LEARN ABOUT TAGS AND CUSTOM FIELDS

Slice and dice your database into useful groups using Tags and extend your client records with Custom Fields.

- Watch the **Tag Manager Video (rem.ax/2Z9pOPV)**.
- Watch this video about **Custom Fields (rem.ax/2ZTUc09)**, then add a few of your own.



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 software 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.



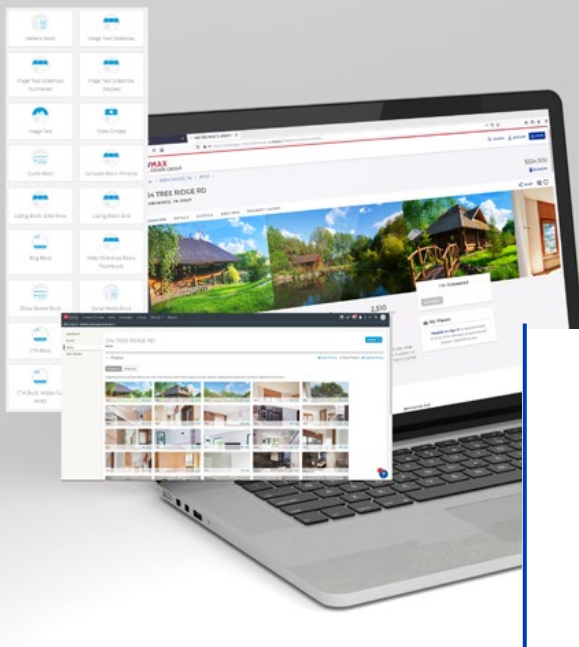
DEAL MANAGER

- Watch the **Deal Pipeline Video (rem.ax/3gzReUY)**, 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.



booj includes a system for creating and publishing a comprehensive real estate website. Each agent, office and team may create and publish a lead-generating site to present their brand, promote their listings and emphasize their market niche. See the **booj Website flyer** for a visual overview.*

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OVERVIEW - CREATING A BOOJ AGENT WEBSITE

- Take the **booj Website Overview Learning Track** (rem.ax/31WFCrZ).

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CREATE A CUSTOM HOMEPAGE

Experiment by rebuilding your homepage:

- Add, remove and rearrange blocks. Keep this **Quick Reference** (rem.ax/38BzDcl) handy while you work.
- Follow along with the **Customize with Content Blocks Learning Track** (rem.ax/2W1IkYy).

1
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LEARN ABOUT LEAD GENERATION AND ROUTING

- Take the **Lead Routing Learning Track** (rem.ax/2VZJJpm) on RE/MAX University.
- Check out this **one-page quick reference** (rem.ax/3eaW2P6).

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HOUR

START WITH RESEARCH TO EXPAND YOUR WEBSITE

Gather and understand your content with a focus on the value you bring to your clients.

- 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.

* Availability is limited to U.S. where booj is available. MLS agreements are required before a booj website can be published.
<https://rem.ax/32agE83>



CREATE CONTENT

You've created your homepage and used the content editor to update the pre-written content. Now it's time to create some new pages from scratch!



- 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.

- Watch the [Editing Homepage Video \(rem.ax/2W1IkYy\)](#).
- 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.

- Watch the [Domain Name Configuration Video \(rem.ax/3gFutiF\)](#).
- Include your new website URL in your MAX/Profile and other platforms such as LinkedIn, professional organizations, your Facebook page, etc.



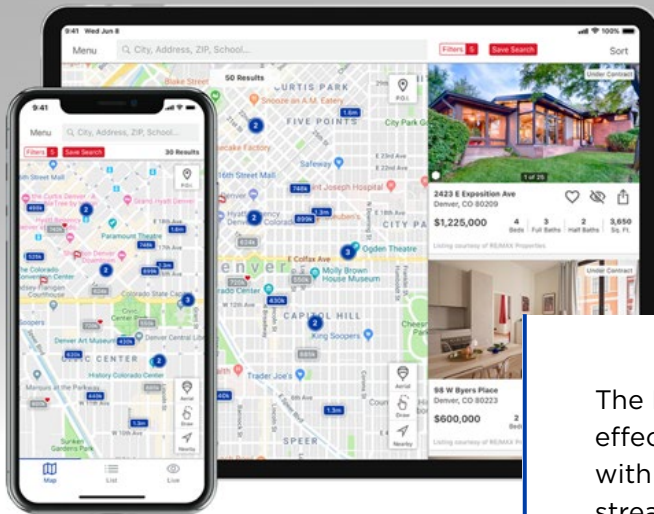
CREATE LANDING PAGES WITHIN YOUR WEBSITE

- 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 booj 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.
- Watch [The RE/MAX Search App in Action Webinar \(rem.ax/2VZGasA\)](https://remax.com/2VZGasA).

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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).

- Watch the [Agent Branding Video \(rem.ax/2O7qe38\)](https://remax.com/2O7qe38), then brand the app installed on your device.

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MINUTES

SEE THE CONNECTION

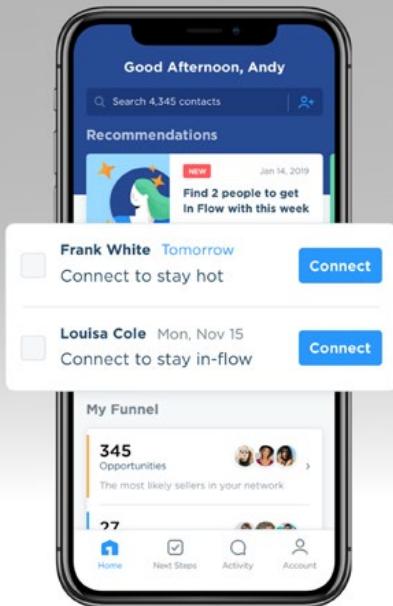
The app will relay useful information about your client's home searches to your CRM.

- 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](https://apple.com) or [Google Play store](https://google.com)! Authentic positive reviews will help build confidence and encourage downloads. If you encounter any problems, please contact [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://remax.com/2Cf4Ypq) at your first meeting.
- Set a goal to share your app with 15 new people each week.



First® helps you identify contacts who are likely to sell within the next year, keeps you accountable with friendly coaching prompts and helps track your improvement over time.

Simply connect - or reconnect - with the contacts prioritized by the app and you'll start to uncover unexpected new deals, sometimes with people you haven't thought about in years. It's that easy and only takes a few minutes each day.

SIGN UP

Getting started is easy and the first 90 days are free of charge.

- Sign up at first.io/sign-up.
- 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 sphere. First is wholly owned by RE/MAX and we are committed to keeping your data safe.

FAST TRACK TO FIRST

- While First analyzes your sphere, take the [Learning Track \(rem.ax/320GU4q\)](https://rem.ax/320GU4q).

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.

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 conversions and completed transactions.



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



DISCOVER PHOTOFY

- Watch the **Photofy: Creating an Account Video (rem.ax/3gRrvYF)** to learn the steps of setting up your new account.
- Sign up and install Photofy.**
- Watch the **Photofy Overview Video (<https://rem.ax/2ZNoY10>)**.



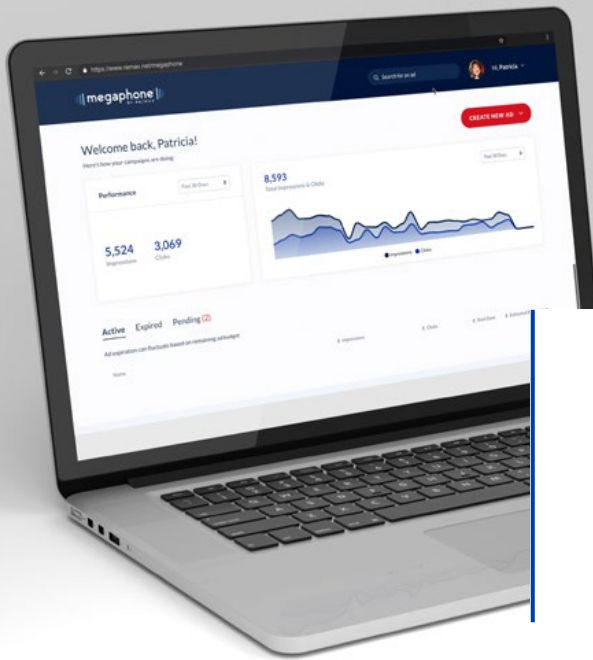
DEVELOP A ROUTINE

- 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 unsolicited client responses to tagged posts and start a bulletin board. Who can collect the most smiles?



AMPLIFY YOUR POSTS

As your confidence and your audience response builds, you're ready to publish your graphics as online ads using **Megaphone!**



Megaphone is our in-house digital advertising platform. Megaphone makes it easy to create campaigns, track results and collect leads from web ads and social media promotions. Megaphone campaigns benefit from cooperative pricing, which provides greater reach for the same budget, in most cases.



DISCOVER MEGAPHONE

- Watch the **Megaphone Introduction Video (rem.ax/38CG52Y)** to learn how it can amplify your promotions and relay leads directly into your CMS.



PLAN YOUR AD CAMPAIGN

- Define your target.
- Use **Photofy** to develop a few messages that will connect with your audience. Watch the **Using Photofy Templates for Megaphone Video (rem.ax/3kH12iO)** to learn how to create and then export graphics to Megaphone.
- Create a new ad campaign to promote a listing on social media.
- Create and schedule an online ad to promote your brand to your market.



EXTEND AN AUTOMATIC CAMPAIGN (U.S. COR only)

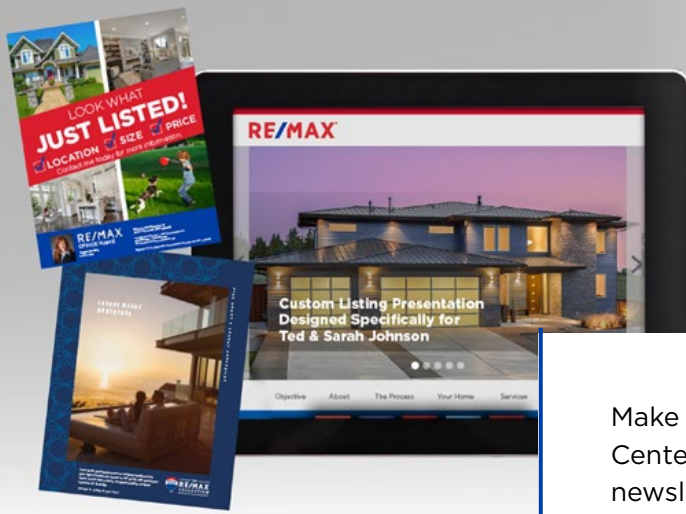
If you're within a Company Owned Region in the U.S., RE/MAX will automatically run a Facebook ad for each new listing for up to one week on your behalf. All leads from your campaigns will be filtered into your booj CRM.

- Watch the **Megaphone: Ad Extension Video (rem.ax/38CBriP)** to learn how to extend one of the campaigns RE/MAX created for you.



CUSTOMIZE PRE-MADE TEMPLATES

Review our library of pre-made advertisements in the **Marketing Portal**, available through MAX/Center. Consider running a coordinated online campaign whenever you run a new out-of-home, print or community event advertisement.



**RE/MAX
DESIGN CENTER**

Make the most of the RE/MAX brand through Design Center, your go-to source for marketing materials, client newsletters and automated listing promotions. Plug in your information, then download branded brochures, social media posts, door hangers, print ads and more.

GET ORIENTED

15
MINUTES

- Watch the **Design Center Overview Video (rem.ax/3iFyfKG)**.
- Complete your **Design Center Profile (rem.ax/2ZaU2IJ)**.

AUTOMATED LISTING PROMOTION

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MINUTES

Set some time aside to take a closer look at the rich trove of promotional materials available on Design Center. Browse through the library of content, star your favorites and write down any fresh ideas to level-up your personal promotion.

- Review the **Automation Orientation Video (rem.ax/2O9L41I)**, then access the marketing packages the system has created for your current listings. Packages are available in several different styles, including Luxury and Commercial designs.

CREATE PROJECTS

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MINUTES

Start with something simple like a brochure or an email. Pick a listing and work through the steps to complete the project.

- Create an eNewsletter. There are pre-written monthly, quarterly, holiday campaigns and more! This is valuable resource if booj is unavailable in your area.
- Create a valuable brochure.
- Create an email campaign.
- To learn more about creating projects, watch the **Design Center Campaigns Video (rem.ax/31GrjVY)**, **Digital Listing Presentations Video (rem.ax/3gSqYpu)** and **Single Property Website Video (rem.ax/3fQFCMF)**.

MAKE IT PART OF YOUR DAY-TO-DAY

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MINUTES

- Update your checklists and task plans in booj to include Design Center Project creation.
- Create custom social posts, brochures, postcards and more!
- Schedule a recurring monthly check-in to add any new contacts to your Design Center address book and check on your eNewsletter campaigns.



technology

PRODUCT SUPPORT

Have tech questions? We have answers!

Text, call, live chat or email the team directly, or quickly access answers to common questions and expert solutions 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