

MAXTECHSM

powered by **B** BoldTrail

BoldTrail BluePrint

Your Step-by-Step Guide to Get Started with BoldTrail

Kick off your training with a simple, structured approach to mastering BoldTrail - without the overwhelm.

- ✓ Understand the platform
- ✓ Build your daily workflow
- ✓ Generate real opportunities

BLAZING THE TRAIL

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SYSTEM ACTIVITIES & HOMEWORK

SESSION 1 (DASHBOARD):

- Set Up Profile, Download Apps
- Review Vitals & Automations
- Do a saved search for organizing your database (example, no Bday, no address, no market report, etc).
- Upload at least 100 Contacts

SESSION 2 (WEBSITE):

- Website Settings & Quick edits
- Add Home App Link to Menu
- Create a Content Page
- Create a Blog

SESSION 3 (MARKETING):

- Smart Campaigns & Automations
- Add Tokens for additional Campaigns
- Create your own e-mail template
- Send a Mass e-mail
- Send a CMA to yourself

SESSION 4 (LEAD ENGINE):

- Create Squeeze Page
- Create Text Code
- Create Landing Page

PROFILE - DASHBOARD SETTINGS

Dashboard & Profile

- Profile / MAXCenter Profile - Title, social, website, mobile #
- Profile & Settings (signature, email, social, etc)
- Download Apps (CRM + Mobile App)
- Review of Vitals

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
 - We HIGHLY recommend meeting with a Lead Configuration Specialist (It's FREE)
- Lead Dropbox - Sync 3rd party lead sources

CRM - CLIENTS JOURNEY

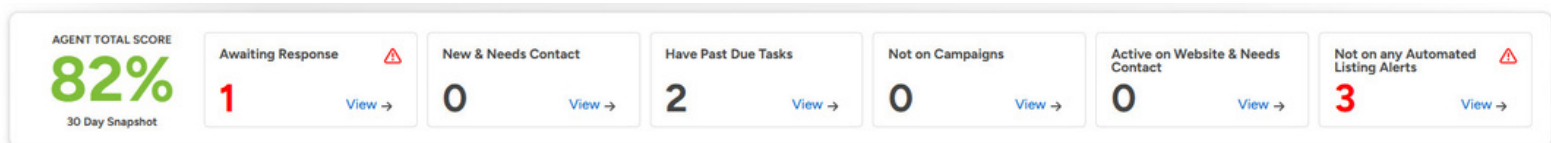
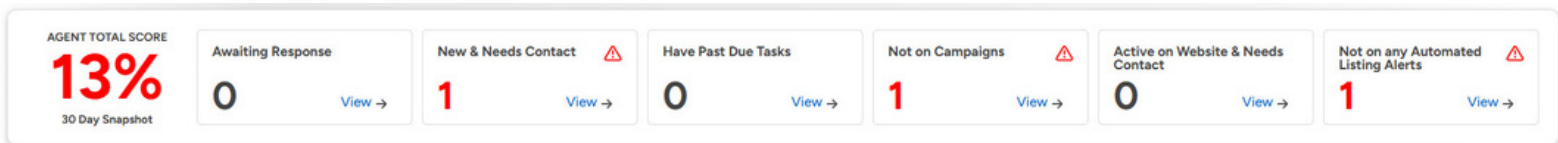
CRM - Get yourself Organized

- Do saved searches for better organization
- Use hashtags to lable & organize

GENERAL GUIDE

- SPHERE - Friends, Family, Referral Connections
- PROSPECT - 6+ months out
- NEW LEAD - Not yet communicated with
- ACTIVE LEAD - 3-6 months from move
- CLIENT - Agreed to work with you or less than 3 months out
- CONTRACT - Client who signed agreement
- CLOSED - Closed on real estate transaction and needs long-term follow up

WHAT IS YOUR VITALS SCORE?



Improve your Vitals Score by completing open tasks!

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 Areas (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

BOLDTRAIL BLUEPRINT

20 MINUTES A DAY

WORKING IN YOUR BUSINESS



20 MINUTES A DAY
WORKING IN YOUR BUSINESS
“YOUR BLUEPRINT 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
- **Daily:** Complete Missing Activities from your Vitals Score

- **Weekly:** Send 5 CMA's to Closed Clients, add #CMAyear (ex: CMA2026) to clients as you send to them. (Do a saved filter for “closed” status without #CMAyear to give you a list of contacts to send to.
- **Weekly:** Work on saved list in CRM to fill in blanks (ex. No Birthday, No address, etc. Spend 10 minutes updating contacts)
- **Weekly:** Add a local blog to your website or content addition (use chatGPT for help), schedule to social.

- **Monthly:** Create & Schedule Monthly e-mail Newsletter with Featured listings, local events, blogs you have done, local market report, National housing report, etc. Clone a Template for easy editing!!
- **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).

MONTHLY BLOG IDEAS

BREWING TO SUCCESS

Here are some monthly blog ideas

- **RE/MAX National Housing Market Update:** Use the marketing assets available monthly to add monthly National Data, embed the video for a monthly blog.
- **Branded Local Market Snapshot Graphic w/ info from your MLS:** You should already be posting these to social so go ahead and add the graphics, videos and information to a blog, then when you are posting to social, link to blog for all information!

Seasonal Local Blogs for Holidays

Don't forget to list your favorite places!

- **Monthly** - Generic Real Estate Blog or Homeowner Maintenance Tips for your area
- **January** - Best places to ring in the New Year
- **February** - Romantic Things to do for Valentine's Day
- **March** - Favorite places to celebrate St. Patrick's Day
- **April** - Easter Egg Hunts around town
- **May** - Celebrate Mom's with these top places
- **June** - Top Things to do with Dad to Celebrate Father's Day
- **July** - Top Places to watch Fireworks
- **August** - School Calendar
- **October** - Spooktacular events - Haunted houses, Trick or Treats, etc
- **November** - Ways to give back Local charities for food drives or best places for Thanksgiving dinners
- **December** - Local Parades & Events, Best places to see Christmas Lights.



MONTHLY BLOG IDEAS BREWING TO SUCCESS

JANUARY - NEW YEAR, NEW REAL ESTATE GOALS

- **"Is 2025 the Year to Buy or Sell? Here's What You Need to Know"**
 - Lead Capture Idea: Free home valuation tool
 - Social Media: "Thinking of buying or selling in 2025? Let's make a plan!"
- **"10 New Year's Resolutions for Homeowners & Future Buyers"**
 - Lead Capture Idea: Homeownership checklist
 - Social Media: "Which of these resolutions is on your list?"

FEBRUARY - LOVE WHERE YOU LIVE

- **"The Most Romantic Spots & Date Ideas in [Your City]"**
 - Lead Capture Idea: Local business partnerships
 - Social Media: "Tag someone you'd take to these spots!"
- **"Is It Better to Rent or Buy in [Your Market] Right Now?"**
 - Lead Capture Idea: Mortgage calculator or rent vs. buy quiz
 - Social Media: "Are you still renting? This might surprise you..."

MARCH - SPRING MARKET & HOME IMPROVEMENTS

- **"Spring Cleaning Tips to Increase Your Home's Value"**
 - Lead Capture Idea: Free home maintenance checklist
 - Social Media: "Which of these cleaning tips do you swear by?"
- **"The Spring Market: Why Now is the Time to Sell"**
 - Lead Capture Idea: Seller guide or free consultation
 - Social Media: "Thinking of selling? Here's why NOW is the time!"

APRIL - TAX SEASON & FIRST-TIME BUYERS

- **"How to Use Your Tax Refund Toward Buying a Home"**
 - Lead Capture Idea: First-time buyer guide
 - Social Media: "Tax refund = home down payment? Let's talk!"
- **"Top 5 Hidden Gem Neighborhoods in [Your City]"**
 - Lead Capture Idea: Local neighborhood guide
 - Social Media: "Would you move here? #HiddenGems"



MONTHLY BLOG IDEAS
BREWING TO SUCCESS

MAY - HOME SELLING & OUTDOOR LIVING

- **"How to Stage Your Home for a Quick Sale (Without Breaking the Bank)"**
 - Lead Capture Idea: Free staging checklist
 - Social Media: "Swipe for 3 easy staging hacks!"
- **"Best Outdoor Living Upgrades to Boost Home Value"**
 - Lead Capture Idea: Local contractor referrals
 - Social Media: "Which backyard upgrade would you love?"

JUNE - SUMMER FUN & RELOCATION

- **"Moving to [Your City]? Here's Everything You Need to Know"**
 - Lead Capture Idea: Free relocation guide
 - Social Media: "Tag someone thinking of moving here!"
- **"Best Summer Activities & Events in [Your Area]"**
 - Lead Capture Idea: Local events list
 - Social Media: "Save this for summer fun!"

JULY - MID-YEAR MARKET & INVESTMENT PROPERTIES

- **"Mid-Year Market Update: What's Next for [Your City]?"**
 - Lead Capture Idea: Free home valuation
 - Social Media: "Where do you think the market is headed?"
- **"Should You Buy an Investment Property in 2025?"**
 - Lead Capture Idea: Investment property consultation
 - Social Media: "Thinking of investing? Read this first!"

AUGUST - BACK TO SCHOOL & FAMILY HOMES

- **"Best School Districts & Family-Friendly Neighborhoods in [Your City]"**
 - Lead Capture Idea: School & neighborhood guide
 - Social Media: "Parents, this one's for you!"
- **"What to Look for When Buying Your Forever Home"**
 - Lead Capture Idea: Homebuyer consultation
 - Social Media: "What's your must-have feature in a home?"



MONTHLY BLOG IDEAS BREWING TO SUCCESS

SEPTEMBER - HOME MAINTENANCE & FALL MARKET

- **"Fall Home Maintenance Checklist: Keep Your Home in Top Shape"**
 - Lead Capture Idea: Seasonal home maintenance guide
 - Social Media: "Are you ready for fall? "
- **"How to Buy & Sell a Home at the Same Time (Without the Stress)"**
 - Lead Capture Idea: Buyer & seller consultation
 - Social Media: "Buying & selling at once? Here's what you need to know!"

OCTOBER - SPOOKY HOMES & REAL ESTATE MYTHS

- **"Haunted Houses & Spooky Real Estate Stories in [Your City]"**
 - Lead Capture Idea: Local events & historic home guide
 - Social Media: "Would you buy a haunted house?"
- **"Top 5 Real Estate Myths You Should Stop Believing"**
 - Lead Capture Idea: Homebuyer myth-busting guide
 - Social Media: "Did you believe #3? "

NOVEMBER - GRATITUDE & MARKET TRENDS

- **"What's Next for the Real Estate Market in 2026?"**
 - Lead Capture Idea: Free market report
 - Social Media: "What are your predictions?"
- **"How to Host the Perfect Holiday Gathering in a Small Space"**
 - Lead Capture Idea: Holiday home decor guide
 - Social Media: "Save this for holiday hosting tips!"

DECEMBER - YEAR IN REVIEW & HOLIDAY CONTENT

- **"The Biggest Real Estate Trends of 2025 (And What's Coming in 2026!)"**
 - Lead Capture Idea: Market trends eBook
 - Social Media: "Which trend surprised you the most?"
- **"5 Things to Do Before Buying a Home in 2026"**
 - Lead Capture Idea: Free homebuyer checklist
 - Social Media: "Planning to buy next year? Start here!"



GOALS BY MONTH

DO - DOING - DONE

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

WRITE 3 TASKS FOR EACH MONTH THAT YOU ARE COMMITTED TO DO.

GET ORGANIZED!

Easily find and
organize
Contacts in CRM

Easily Mass e-mail
/ txt or schedule
e-mail by Hashtag
or search

Upcoming OH,
Price Reduction,
New Listing,
Holidays, Monthly
Newsletter

Set up smart
Campaign based
on Triggers
(hashtags, status,
date, etc)

CONTACT FORM ON PAGES

All leads will get
labeled with the
hashtag you enter
for easy follow up!

#hashtag

SQUEEZE PAGE - LANDING PAGE

All leads will get
labeled with the
hashtag you
enter for easy
follow up!

PLAYBOOKS

Give you squeeze
page link, mass e-
mail to #hashtags,
label leads with a
hashtag for that
property making
follow up or
future listing
announcements
so easy!

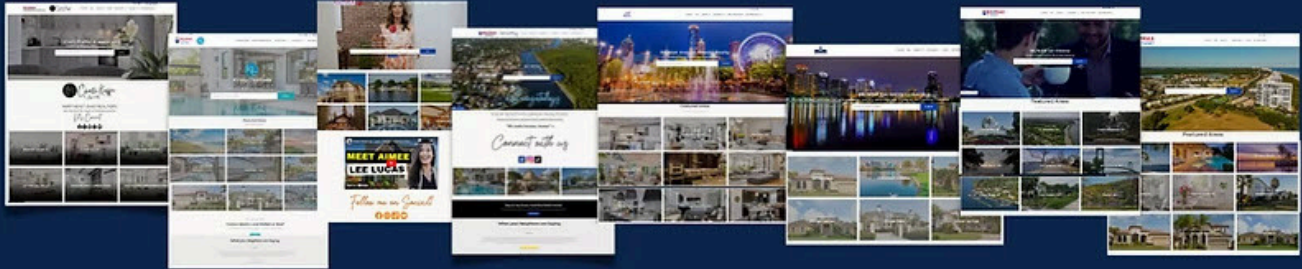
OPEN HOUSE APP

Turn on OH Smart
Campaign for auto
follow up! All leads
using app will get
#hashtag for that
property too!

MAXTECHSM

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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!

boldtrailearning.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](#)



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