RE/MAX TRAINING GUIDE

BoldTrail CRM Instruction Manual

Step-by-Step Guides for RE/MAX Hustle, BoldTrail Present (CMA), and Marketing Studio

For RE/MAX Agents & Broker Owners

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Section 1: Creating Social Media Videos with RE/MAX Hustle

Overview

RE/MAX Hustle (remaxhustle.com) is a free tool available to all RE/MAX associates that lets you create professional, branded video content and graphics in minutes. No video editing experience required. Hustle offers seven creation tools:

1. **Customize a Commercial** — Personalized agent commercial
2. **Hustle Video Editor** — Build a custom video from scratch
3. **Custom Listing Video** — Showcase a specific listing
4. **Recruitment Video** — Share with potential recruits
5. **Digital Welcome Mat** — Welcome new clients

6. **Hustlegraphic** — Create branded infographics
7. **Community Message** — Show community support

1A: How to Create a Custom Listing Video (Step-by-Step)

Getting Started

8. **Go to remaxhustle.com and log in.** You can also access Hustle through MAXCenter if you prefer.
9. **Click "Create a Custom Listing Video"** from the main menu on the Hustle home screen.
10. **You will see a 4-step wizard.** Follow each step described below to build your listing video.

Step 1 — Agent Info

11. **Enter your name** as it should appear on the video.
12. **Enter your RE/MAX office name.**
13. **Check the compliance box** if your state requires the Office/Broker name to be larger than your name. If you are unsure, check with your Broker Owner.
14. **Optionally add** your phone number, email address, and website.
15. **Upload your headshot photo.** The image must be in **.jpg** or **.png** format.
16. If you do not have a headshot ready, select **"I don't have a headshot"** and RE/MAX will use a branded design instead.

Step 2 — Listing Details

17. **Upload 2–3 photos** of the listing that show it at its best.
18. Images must be in **.jpg** or **.png** format.
19. **Enter the property address** in the address field.

Step 3 — Pick Your Features

20. **Select exactly 3 feature clips** from the video library that highlight the listing's best attributes.

21. **Number the clips** in the order you want them to appear in the video (1, 2, 3).

Available feature clips include:

Feature Clip	Feature Clip	Feature Clip
Transit Friendly	Lots of Storage	Top-Rated Schools
Energy Efficient	Great Light	Smart Features
Prime Location	Lots of Character	Hardwood Floors
Just Remodeled	Backyard Features	Ample Parking
Luxury Features	Open Floor Plan	Agent's Choice *

Note

Agent's Choice can only be selected as clip number 2 (the middle clip).

Step 4 — Choose Your Music

22. **Select a music track** for your video from the available options:

Track Name	Style
Like a Boss	Confident, upbeat energy
Hustle Hero	Motivational, dynamic
Funk For Sale	Fun, groovy vibe
Key Rock	Energetic, bold

Finalize & Download

23. **Review all your selections** on the summary screen.

24. **Click "Create Video"** to start rendering.

25. **Wait for the video to render** — this usually takes under 2 minutes.
26. **Download the finished video** to your device.
27. **Share directly** to Facebook, Instagram, YouTube, or via email.

1B: How to Create a Personalized Commercial

28. **Go to remaxhustle.com** and click **"Customize a Commercial"** from the main menu.
29. **Enter your agent information:** name, office, and contact details.
30. **Upload your headshot** (.jpg or .png format).
31. **Select 3 clips** from the library that represent the tools you use most to set yourself apart. These clips represent your skills and differentiators — they are not specific to a listing.
32. **Choose your music track** from the available options:
    - #SellYeah
    - Swagger
    - Jazzy
    - Hustle
33. **Review your selections** and click **"Create Video."**
34. **Download and share** on social media, email, or your personal website.

1C: How to Create a Hustlegraphic (Branded Infographic)

35. **Go to remaxhustle.com** and click **"Create a Hustlegraphic"** from the main menu.
36. **Choose from available infographic templates.** Browse the options to find one that fits your message.
37. **Customize with your information,** stats, or market data.
38. **Add your branding:** name, photo, and contact information.
39. **Download the finished graphic** as an image file.

40. **Share on social media** (Instagram, Facebook) or use in email campaigns.

1D: Other Hustle Tools (Brief Overview)

Tool	What It Does
Hustle Video Editor	A more flexible video creation tool where you build a custom video from scratch with your own clips and content. Best for agents who want full creative control.
Recruitment Video	Pre-built video templates designed to attract potential recruits to your office. Customize with your office details and share with prospective agents.
Digital Welcome Mat	A branded welcome message to send to new clients. Personalize it with your information and share via email or text message.
Community Message	Create a branded video showing support for your community. Great for local events, holidays, or causes you care about.

💡 **Pro Tips for RE/MAX Hustle**

- All Hustle content is automatically RE/MAX branded — no need to add logos manually.
- Videos are optimized for social media sharing (proper aspect ratios and file sizes).
- Bookmark remaxhustle.com for quick access, or find it through MAXCenter.
- Create a listing video for every new listing as part of your listing launch workflow.
- Use Hustlegraphics for market updates, just-sold announcements, and open house promotions.

Section 2: Creating a CMA Using BoldTrail Present

2A: How to Access BoldTrail Present

41. **Log in to your BoldTrail CRM** (MAXTech powered by BoldTrail).
42. **Click on the "Marketing" tab** in the left-side main navigation panel.
43. **Look for the "Present" or "CMA Builder" tile** and click **"Get Started."**

2B: How to Create a CMA Report (Step 1 of 2)

Step 1 — Enter Client and Property Info

44. In the **"Prepared For"** field, enter your client's name.
45. In the **"Property Address"** field, begin typing the subject property address.
46. Keep typing until the correct address suggestion appears in the dropdown.
47. **Click on the correct address suggestion** to select it.
48. Enter the apartment/unit number if applicable.
49. Click **"Build CMA."**

Step 2 — Review Subject Property Details

50. Present will pull data from public tax records for the subject property.
51. **Review and verify** the following fields:
    - Property type
    - Bedroom count
    - Bathroom count
    - Square footage
    - Year built
    - Lot size
52. Click the **blue pencil icon** next to any field to edit incorrect data.
53. Click the **blue checkmark** to save your changes.

Step 3 — Adjust Comparable Search Criteria

Criterion	Default Setting	How to Adjust
Property Type	Matches the subject property type	Check additional types if needed
Year Built	All years	Narrow to a specific decade range if desired
Closed Date	Last 6 months	Use the slider to expand up to 24 months
Distance	Default radius	Adjust the radius to include a wider or narrower area

Step 4 — Review and Select Comparables

54. Present will display matching comparable properties from MLS data.
55. **Review each comparable** for relevance to the subject property.
56. You can **add custom comparables** by manually entering MLS IDs.
57. **Remove any outlier properties** that are not true comps.
58. Adjust comparable values if needed (e.g., adjust for pool, view, or condition).

Step 5 — Review the Pricing Picture

59. Present generates a **visual pricing range** based on your selected comparables.
60. Review the suggested price range.
61. **Adjust the pricing emphasis** as needed to tell a compelling pricing story for your client.
62. The **Market Assessment** section displays data tiles with key market statistics.

Step 6 — Save Your CMA

Save your CMA or proceed directly to build your listing presentation (see Section 2C below).

2C: How to Create a Listing Presentation (Step 2 of 2)

Step 1 — Choose Your Presentation Format

After your CMA is built, choose the presentation format that fits your needs:

Presentation Format	Best Used For
Seller Listing Presentation	Listing appointments with sellers; includes full CMA data
Buyer Presentation	Buyer consultations; may not include CMA data
Win the Representation	Buyer's agent value presentation; includes slides on compensation and representation

Click **"Start"** on your chosen format to begin building.

Step 2 — Select Theme and Emphasis

Theme: Choose from **Traditional**, **Modern**, or **Luxury**.

- Each theme has a different visual style and slide design.
- Any customizations you have saved to a theme (in Settings) will auto-apply.

Emphasis: Controls the order and focus of presentation sections.

- **"Default Order"** reflects your saved customizations.
- Other emphasis options reorder sections to prioritize different topics (e.g., pricing first vs. marketing first).

Step 3 — Customize Your Slides

Present organizes slides into 4 main sections by topic. You can:

- **Reorder sections** by dragging them into the desired position.
- **Add or remove individual slides** within each section.
- **Drag and drop slides** to rearrange within the presentation.
- **Preview each slide** before sharing to ensure accuracy.
- **Add custom slides** with your own content, logos, awards, and achievements.

Step 4 — Preview Your Presentation

63. Click **"Preview"** to see the full presentation as your client will experience it.
64. Check that all data is accurate, branding is correct, and the flow makes sense.

65. Make any final adjustments before sharing.

Step 5 — Share Your Presentation

66. Click **"Share"** to generate a link for your client.
67. **Copy the link** and send it via email, text, or your BoldTrail CRM.
68. Your client will receive an interactive, web-based presentation they can click through at their own pace.

Step 6 — Track Client Engagement

69. After sharing, Present tracks **when your client opens and views** the presentation.
70. You will receive **notifications** when they view it.
71. The **analytics dashboard** shows which slides and data points they spent the most time on.
72. Use this data to time your follow-up and focus on topics that interested them most.

2D: Customizing Your Present Settings (One-Time Setup)

Complete these steps once, and every future presentation will be pre-branded with your information:

73. **In Present, go to your Settings/Preferences.**
74. **Upload your headshot** and update your contact information.
75. **Add your personal branding:** awards, designations, and testimonials.
76. **Customize default slide order** for each theme (Traditional, Modern, Luxury).
77. **Enable or disable specific slides** as defaults for future presentations.
78. **Save your settings.** They will apply to all future presentations you create.

Pro Tips for BoldTrail Present

- Set up your Settings/Preferences once and every future presentation will be pre-branded.

- Use the "Win the Representation" format for buyer consultations — it includes slides on buyer's agent value and compensation.
- Always check the subject property details before generating comparables.
- The analytics feature is a game-changer for timing your follow-up calls.
- Create a CMA for every listing appointment, even if it is a quick one-page version.

Section 3: Creating Social Media, Print, and Video Graphics with BoldTrail Marketing Studio

3A: How to Access Marketing Studio

79. **Log in to MAXCenter** (maxcenter.remax.com) or your BoldTrail CRM.
80. **Look for the "Marketing Studio" tile** on your dashboard.
81. **Click to open** Marketing Studio.

3B: Creating Social Media Graphics

Step 1 — Choose a Template

Browse the template library by category:

Template Category	Best Used For
Just Listed	Announcing a new listing
Just Sold	Celebrating a closed deal
Open House	Promoting upcoming open houses

Template Category	Best Used For
Market Update	Sharing local market data
Holiday/Seasonal	Timely greetings and seasonal content
Personal Branding	Building your agent brand
Testimonials	Highlighting client reviews

Select a template that fits your needs. All templates are pre-branded with RE/MAX styling.

Step 2 — Customize Your Content

82. **Upload your listing photos** or personal headshot.
83. **Edit text fields:** property address, price, property details, and your contact information.
84. **Adjust colors or accents** if customization options are available.
85. **Add or remove elements** as needed.

Step 3 — Choose Your Format

Select the output format for the correct platform dimensions:

- **Instagram Post** (square)
- **Instagram Story** (vertical)
- **Facebook Post**
- **Facebook Cover**
- **Twitter/X Post**

The template will auto-resize to the correct dimensions for the platform you select.

Step 4 — Download or Share

86. **Download the finished graphic** to your device.
87. Or **share directly** to your connected social media accounts.

3C: Creating Print Materials

Step 1 — Browse Print Templates

Categories include:

- Listing Flyers
- Property Brochures
- Just Sold Postcards
- Open House Flyers
- Door Hangers
- Business Cards
- Newsletters

Select a template that matches your marketing needs.

Step 2 — Customize

88. **Upload listing photos.**
89. **Enter property details,** pricing, and your contact information.
90. **Edit any text blocks** to match your messaging.
91. **Verify your office name** and broker information is correct.

Step 3 — Download for Printing

92. **Download as a print-ready PDF.**
93. **Use your preferred print vendor** (Vistaprint, local print shop, or office printer).

3D: Creating Video Graphics

Step 1 — Choose a Video Template

Browse available video templates by category:

- Listing Showcase
- Market Report
- Agent Introduction
- Just Sold Celebration

Select a template that matches your goal.

Step 2 — Add Your Content

94. **Upload listing photos** (usually 3–6 photos work best).
95. **Enter property details** and pricing.
96. **Add your headshot** and contact information.
97. **Select background music** from the available library.

Step 3 — Preview and Generate

98. **Preview the video** to check timing, photo order, and text accuracy.
99. Click **"Create"** or **"Generate"** to render the video.
100. **Wait for processing** — usually 1–3 minutes.

Step 4 — Download and Distribute

101. **Download the finished video** to your device.
102. **Share on:** Instagram Reels, Facebook, YouTube, TikTok, or email campaigns.

3E: Automated Listing Marketing Campaigns

103. **In Marketing Studio, navigate to your listing automation settings.**
104. **Set your preferences** for which marketing materials are automatically created when you enter a new listing.
105. **Choose which channels** to auto-deploy to (social media, email, etc.).
106. **Click "Save"** to enable automation.

107. When you enter a new listing, **Marketing Studio will automatically generate and deploy** branded marketing materials based on your saved preferences.

3F: Tracking Campaign Performance

108. After a campaign is live, **Marketing Studio sends a confirmation email** with a link to the campaign dashboard.
109. **Click the link** to view real-time results.
110. **Metrics available include:**
    - Campaign delivery
    - Participation
    - Clicks
    - Performance by listing or agent
111. **Share the dashboard link** with your seller clients to demonstrate marketing activity and prove value.

💡 **Pro Tip**

Include the campaign performance link in your seller update emails to build trust and transparency. Sellers love seeing proof that their listing is being actively marketed.

💡 **Pro Tips for Marketing Studio**

- Set up your automation preferences first — this saves hours on every new listing.
- Use AI-generated videos for quick, professional listing content without editing skills.
- Share campaign performance dashboards with sellers to demonstrate your marketing value.
- Create content across all three formats (social, print, video) for maximum exposure.

- Check Marketing Studio regularly for new templates — they are updated frequently.