RE/MAX EXECUTIVE

# TRAINING WORKSHEET

MAXTECH

powered by kvCORE PLATFORM

## LOGGING INTO KVCORE

When logging in to MAX/Tech powered by kvCORE, you will always use your MAX/Center login credentials. If you have difficulties checking your MAX/Center credentials, please call or text RE/MAX Product Support at (888) 398-7171.

- [ ] Bookmark the website maxtech.kvcore.com on your browser.
- [ ] Download the MAX/Tech powered by kvCORE app and the Open House app.

App → IOS | Android

App → IOS | Android

## YOUR PROFILE SETTINGS

**My website's URL is** ______________________________ .

- Save your website as a bookmark on your browser. ☐

### Contact Info

Check once completed

- Are your Agent MLS IDs added? ☐
- Is your NRDS ID added? ☐
- Is your cell phone added? ☐
- Is your website added? ☐
- Are your designations added? ☐

### Social Media & More

*Go to MAX/Center (www.remax.net) to update the fields that are greyed out.*

Check once completed

- Is your business Facebook URL added? ☐
- Is your Twitter page added? ☐
- Is your LinkedIn page added? ☐
- Is your YouTube channel added? ☐
- Is your Instagram added? ☐
- Is your license number added? ☐
- Under 'Position' select the correct feild. ☐
- Under 'About Me', is your bio added? ☐
- Is your email signature added? ☐
  - Be sure to toggle on 'Include signature on all outgoing email'. ☐

## SMART NUMBER

**Definition:** The number kvCORE uses to rout leads to you. Each office has their own SMART number. Agents within a office will all recieve leads from the same number.

**DO NOT CALL OR TEXT THIS NUMBER UNDER ANY CIRCUMSTANCE.**

**Always use the ______________________________ when repsonding to leads.**

**Where do I find this in kvCORE?** At the ______________ of kvCORE under your name.

**Action Items**

- [ ] Save your office's SMART number in your phone as 'kvCORE Lead'.

**North Carolina**

Office

- Asheville (828) 761-7234
- Ballantyne (704) 286-1522
- Cornelius (704) 703-7337
- Gastonia (704) 703-3514
- Hendersonville (828) 547-4121
- Mooresville (704) 387-3104
- Southpark (704) 286-9440
- Waynesville (828) 547-3496
- Wimington (910) 541-5609

Team Office

- Albemarle (The Lee Allen Team) (980) 291-4470
- Denver (LKN Pros) (704) 285-2916
- Leland (Domin & Schwartz) (910) 537-2843
- Mars Hill (Mountain Laurel Team) (828) 800-0827
- Mint Hill (The Jayson Mack Team) (704) 826-3446
- Oak Island (Destination Beach Team) (910) 541-5719
- Wilmington (Jennifer Bullock Team)
- Wilmington (The Hopkins-Dunn Group) (910) 629-1940
- Wilmington (Scott Gregory Group) (910) 537-2533

**South Carolina**

Office

- Anderson (864) 660-0384
- Fort Mill (803) 887-3451
- Georgetown (843) 749-8126
- Greenville (864) 660-0758
- Myrtle Beach (843) 351-1044
- Pawleys Island (843) 896-3030
- Spartanburg (864) 863-7723

Team Office

- Indian Land (The Premier Team) (803) 887-2652
- York (The Cheryl Boyd Team) (803) 882-3201
- Greenville (The Yukich Group) (864) 660-0718

Supporting Article
& Troubleshooting

## LEAD ROUTING

**Where do kvCORE leads come from?**

1. Property Leads = RE/MAX Listings OR non-RE/MAX Listings
2. Consumer Choice
   - Contact Me Forms: will be routed directly to the agent selected
   - Preferred Buyer Agent Leads: Consumers have the ability to select a preferred buyer agent on remax.com. Once this relationship is established, all activities will be sent to the PBA (contact forms, showing requests, property inquires).

Leads generated on your listings will be directly assigned to________________ as the listing agent.

Leads generated on non-RE/MAX listings will be sent to the office and follow a round robin rotation for the next agent in line.

I will receive notification of a new lead via ________________ , ________________ , and __________________.

You have _____________ minutes to accept a lead or it will get routed to the next agent in line.

## TRANSFERRING A LEAD

If you don't want a lead, you can choose to transfer that lead to another RE/MAX Executive agent or team member. By using kvCORE's 'Transfer' feature, the receiving agent will get an automatic notification that you transferred a lead to them AND that lead will be assigned to them within their kvCORE account.

**Where do I find this in kvCORE?** Click on the SMART CRM tab on the left navigtaion bar. Search for the contact and click on their name. On the right, click the 'More Actions' link then click 'Transfer Contact' from the drop-down that appears. Type in the user's name that you wish to transfer the contact to. Click the user's name to select them from the drop-down that appears. Click the green "Transfer" button on the bottom left.

## LEAD DROPBOX

Tip: Stay as organized as possible! Let’s get all of your leads flowing into kvCORE that way everything is in one place. This way, you can trust that every lead you could ever receive is flowing in the system accordingly!

Zillow

Realtor.com/OptCity

Email Pharsing

## UPLOADING CONTACTS

See Pre-Launch Checklist Guide for info on this section or contact help@rmxexecutive.com for further guidance.

For assistance on uploading your contacts into kvCORE, please reach out to **help@rmxexecutive.com**

## 4 BEST PRACTICES TO BEGIN LEAD CONVERSION

**What is a campaign?** A pre-determined template of of texts, emails, and tasks that are assigned to a contact. The kvCORE Library contains all of the pre-built campaigns designed by Inside Real Estate. These campaigns have been thoroughly tested and are IRE's best take on an effective campaign for the given contact type.

1. Automate communication with SMART campaigns.
2. Review lead details in the contact record to spark conversation.
3. Set up a property search that matches the area they are looking in.
4. Create a recurring market report to inform them about local market conditions.

### Automate Communication

**Action Items (Recommended)** ☑

☐ Add the recommended campaigns below to your library.
**Instructions:** Click on the Marketing tab on the left navigation pane ➜ click *SMART Campaigns* ➜ click *kvCORE Library* ➜ type in the campaigns name ➜ click *Add to My Library* ➜ *repeat.*

- 2 New Lead Campaigns: ______________________________ and ________________________________ .
- 3 Active Lead Campaigns: ______________________________ , ________________________________ and ________________________________ .
- 3 Contract Status Campaigns: ______________________________ , ______________________________ and ________________________________ .

☐ After you've added each campaign to your library, click into each of them and edit the wording so it sounds moe like you!

## AUTOMATIC CLIENT COMMUNICATIONS

**3 Types**

**1.** ______________________________ --> ______________________________

**2.** ______________________________ --> ______________________________

**3.** ______________________________ --> ______________________________

## Behavioral Automations

**Defintion:** Automatic communications sent to my contacts when they

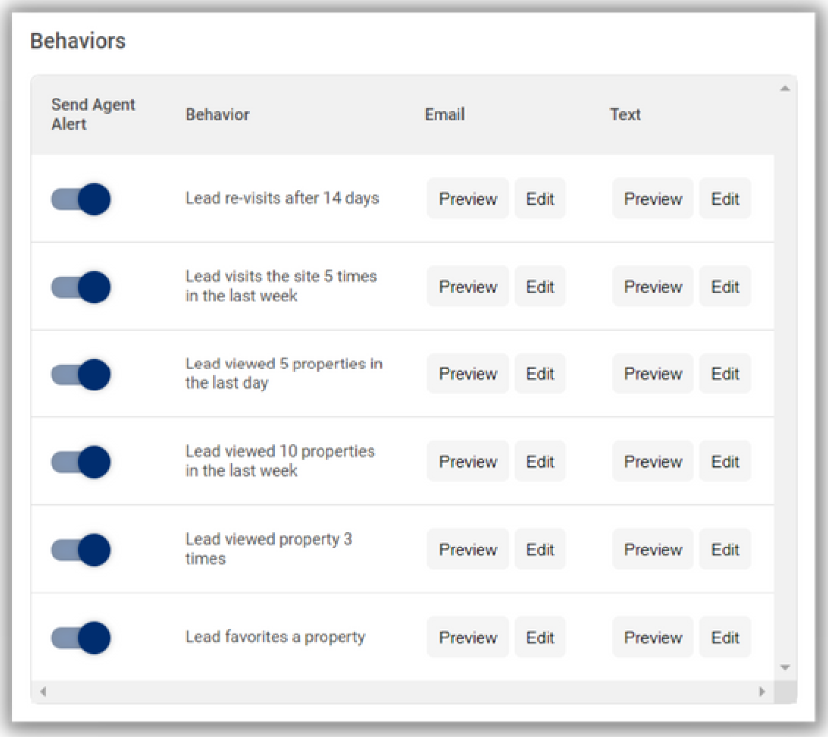
______________________________________________________________.

**Action:** ☐ Text Message? ☐ Email? ☐ Phone Call?

**Where do I find this in kvCORE?** Within the left navigation pane in the ______________________ tab.

### Action Items

- ☐ Check the 'Contact Statuses' section.
- ☐ Check the 'Behaviors' section.
- ☐ Do you want to be notified when a contact does this behavior on your website?
- ☐ Preview and edit each text & email so they sound a little more like you!




[Supporting Article & Troubleshooting]

## Search Alerts, Seller Report, Market Report

**Search Alerts:** Automated emails sent to my contact that

contain __________________________________________________.

**Action:** ☐ Text Message? ☐ Email? ☐ Phone Call?

**What kind of properties?** Newly listed, price reduced, and gone off-market properties listed in the MLS that match their search criteria.

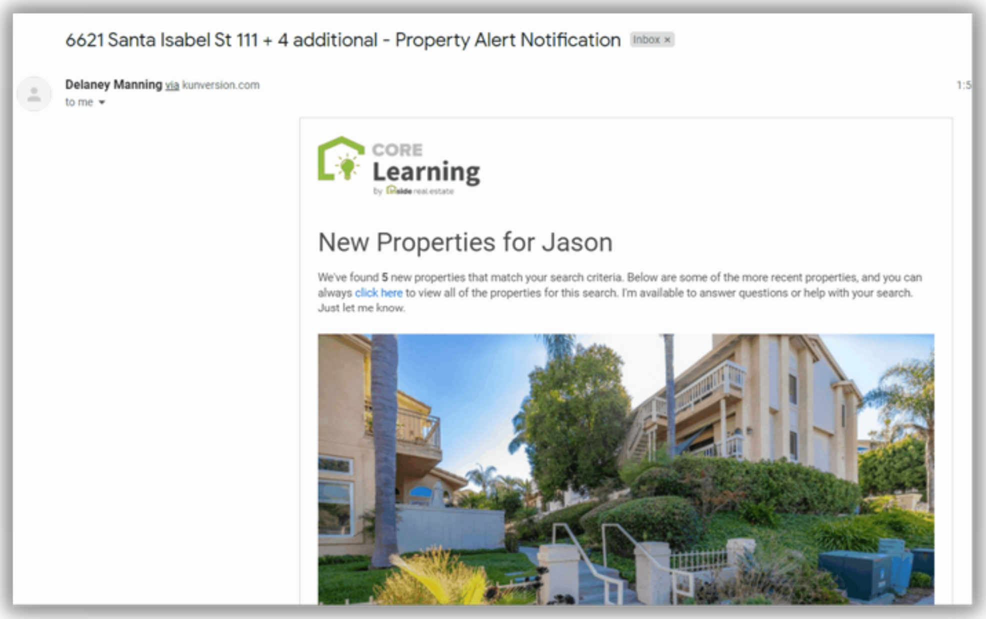
**Where do I find this in kvCORE?**

- Auto assign search alerts using hashtags: Within the left navigation pane in the ____________________ tab.
- Manually assign a search alert to a contact: Within the left navigation pane in the ____________________ tab. Open the contact you want to set up search alerts for, then click 'Alerts' above their name.

**How many alerts can I set up per contact?** ____________________.

**Action Items** ☑

- ☐ Do you have current clients you'd like to set up a search alert for?
- ☐ Would you like to set up search alerts in bulk for your current contacts?
- ☐ Would you like to set up automatic search alerts for new leads?




[Supporting Article & Troubleshooting]

**Where do I find my website in kvCORE?** Click on your name at the top right of the screen.

**My website is** ______________________________________________ .

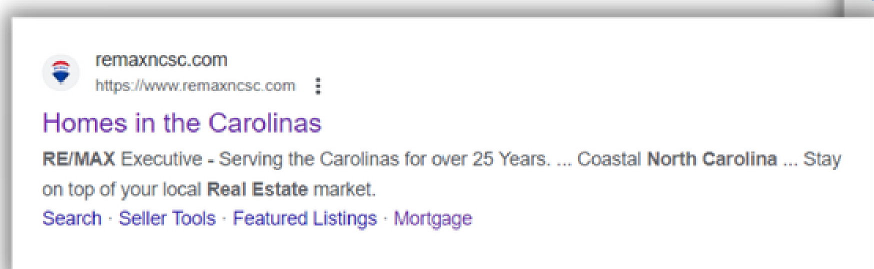
## LET'S MAKE SOME CHANGES

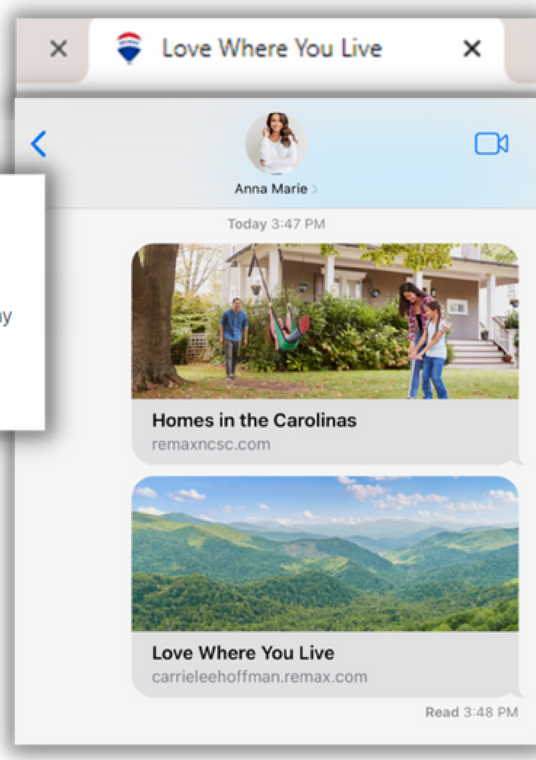
☐ **Background Image**
- Hover over *Web & IDX,* then click *Website Settings*. Scroll a bit until you see the section titled, *Background Image(s)*. Below this section you'll see a grey screen where you can upload your own image. You may use www.pexels.com to find an image to upload here.

☐ **Secondary Logo**
- While on the same page as above, scroll down a bit to the section titled *Secondary Logo*. If you have your own logo, please upload here. If you have a team logo, you may use this here also.

☐ **Website Title**
- Scroll  down to *Website Title*. This is title that shows up on the tab of your website above the seach bar. Anytime you share your website, this will be the title people read!

☐ **Homepage Meta Descriptions**
- Scroll down to *Homepage Meta Description*. This is the description that shows beneath below the Website Title on Google.




☐ **Facebook User Name for Chat**
- Scroll further down to *Facebook User Name for Chat*. Make sure you enter in your Facebook Business page <u>username</u> (not the website).

By adding your username, visitors can chat with you via Facebook Messenger when they click on the Chat With Me Button at the Bottom.

**Testimonials**

- Scroll further to *Testimonials* under *Connect Zillow Reviews*. Enter in your Zillow Screen name. You can find your screen name by searching your name in Google as such, “Tiffany Johannes Zillow”. Click on the Zillow link that pops up and you’ll see “screename” to the right of the page under *Professional Information*.

**Service Areas & SEO**

- Hover over the *Website & IDX* tab on the left tool bar, then click *Website Content*. Then click on *Service Areas & SEO*. Here, you can choose to Add All Cities From MLS, or enter in specific areas you serve.
- For Keywords, you can enter “Homes in ______” or “Moving to _______”

**Custom Pages**

- While on the same page as above,