

A Path for Every Agent



The Small Team

"We're a team operating as two independent brokers plus an assistant. We rely less on marketing and more on relationship building."



The New Agent

"I'm new to the business. I need to get experience and establish my expertise."



The Career Agent

"I'm an established agent. I want to create a strong referral base by building my SOI."



The Top Producer

"I'm a top producer in a hot market. I have a strong client base and I rely on my vast SOI."

Starting Career

Building Business/Prospecting

Servicing Clients

Prospecting/Cultivating Business

Agent Support/Retention

Ending Career

Desk
Get access to all my applications

Brand University (Learning Platform)
Get acquainted to my new products

Desk
Explore the Help Center and additional training material and support resources

Design Concierge
Order a custom logo, email signature, social graphics and professional bio

Design Concierge/Xpressdocs
Order business cards and personal brochure

MoxiWorks
Create a custom bio page for listing and buyer presentations

"I want to better promote myself but I'm not good at marketing. I really want to get my name out there and stand out amongst other agents."

MoxiWorks
Create a website

MoxiWorks/InTouch/Cloze
Upload my contacts

MoxiWorks/Social Ad Engine/Market Quest
Promote myself on social media

MoxiWorks/InTouch/Cloze/Prospect Square
Create a drip campaign for my SOI

MoxiWorks/InTouch/Cloze
Follow up with my leads

"How can I get new prospects when I'm just starting my career?"

"I've been doing this a while and business is good but momentum has stalled. I need to nurture my leads."

MoxiWorks/InTouch/Cloze/Social Ad Engine
Nurture my leads

Cole Realty
Grow my sphere of influence

Prospect Square
Enroll my SOI in Clients for Life

"My income has plateaued. Maybe it's time to create a partnership."

"I want to keep my clients sufficiently informed at all times."

Transaction Manager/My Deals/DoLoop
Manage my transactions

Brand.com
Send my clients listing alerts

Listing Concierge
Send my clients a Client Report

Exclusive Look
Network with my office and brokerage

MarketQuest
Position myself with data

Listing Concierge
Create a custom marketing package for my listings

MoxiPresent
Build dynamic, interactive presentations that update in real time

"Business is growing. I want to offer my clients excellent service, but I can't do this all on my own."

MoxiWorks/Prospect Square
Send a drip newsletter campaign

MoxiWorks/Social Ad Engine
Run a Facebook ad campaign

Client Satisfaction Survey
Learn from past clients

"Referrals are my bread and butter. I want to make sure my clients are wowed and my referral network continues to grow."

"What can we do to better retain our clients and earn more referrals?"

ePay/Agent Earnings
Manage my finances

Brand University (Learning Platform)
Take finance and business courses

Desk
Track, manage and forecast earnings

"I want to manage my business and finances more effectively."

"How do we increase revenue while keeping costs down?"

"I think it's time to retire."

Agent Earnings
Track my continued earnings