



# MOXIWORKS® ENGAGEMENT RESOURCE GUIDE

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# WELCOME TO MOXIWORKS®

Dear Coldwell Banker Team Member,

Welcome to the MoxiWorks Engagement Resource Guide! This guide is designed to help navigate you through all the learning, and resources available to help you and your affiliated agents engage with the MoxiWorks platform. This interactive resource guide is built for easy application and use...just click and go!

MoxiWorks® is among the most popular and powerful agent and consumer experience platforms in the real estate industry. We believe its robust toolbox of product offerings will delight you and your clients, as these offerings integrate effortlessly with our technology and data systems. The MoxiWorks product suite is comprised of easy apps that help connect your services and tools while streamlining your business. The result is a simple, time-saving, integrated solution.

Review this document to become acquainted with everything the MoxiWorks platform has to offer you. If you have questions, reach out to your Account Manager, as they are more than happy to assist you!



Get to know the MoxiWorks suite of products:

**MoxiPresent®** is the industry-leading real estate companies market analysis (CMA) tool that enables you to seamlessly guide your clients through the home buying or selling journey. Its MLS integration provides you with all the information you need to truly embrace your role as a trusted consultant in the eyes of your clients while appearing tech-savvy and innovative.

In fact, agents who used MoxiPresent earned 1.5X more\*. To learn more about MoxiPresent [click here](#).

The **MoxiEngage®** CRM tool is specifically designed to fit your unique selling needs. It leverages property data, encourages long-term lead nurturing, drives repeat and referral business, and keeps you on track to reach your sales goals. To learn more about MoxiEngage, [click here](#)

**MoxiWebsites®** is an easy-to-use website builder for your sites that makes putting your best foot forward a simple task. Grow your brand, sphere and business with custom, branded websites. To learn more about MoxiWebsites, [click here](#)

**MoxiImpress®** is a marketing tool built to increase productivity by easily marketing your listings and business, reaching more people, building stronger relationships with your prospects and clients, and helping to drive more business. To learn more about MoxiImpress, [click here](#).

**MoxiTalent®** is an automated talent identification tool that help guides your recruiters and managers through the process of identifying, recruiting and retaining the best agents for your brokerage. To learn more about MoxiTalent, [click here](#).

\*Based on average commission amount of active agents and teams with production that created a buyer, seller, and/or generic presentation in MoxiPresent Jan. 1<sup>st</sup>, 2021 - Dec. 31<sup>st</sup>, 2021. Results are not guaranteed. MoxiWorks and its related marks and logos are owned by MoxiWorks, LLC and used with permission. Any services or products provided by MoxiWorks, LLC are not provided by, affiliated with, or related to Coldwell Banker Real Estate LLC, or its affiliated companies.



# QUICK REFERENCE GUIDE

Our quick reference guide is designed to highlight our core learning opportunities to enhance your skills within the MoxiWorks platform. Whether you enjoy quick videos, session lead by instructors or actual users sharing best practices we have many options to choose from, utilize the quick reference below or navigate to the additional pages in this guide for more details.

## SPECIFIC PRODUCT TRAINING VIA CBU

- Specific product training on each product: MoxiPresent, MoxiImpress, MoxiEngage, MoxiWebsites, MoxiTalent. Designed for agents to enhance usage of the specific tool.
- Constant offerings, registration required
- Available on [CBU](#)
- Click here to [view January's monthly trainings](#)

## MOXIWORKS HOURS

- Essentials sessions are designed to show Agents "how to" best use specific features of the MoxiWorks products to make a difference in their business.

## MASTERMIND

- Use this time as a chance to collaborate with other Product Champions from across the nation. We will discuss ways to drive adoption, increase revenue, and anything else you seem fit for likeminded Product Champions.
- [Register here](#)
- Monthly. Registration required.

## PRODUCT CHAMPIONS CORNER

- A chance to hear from your peers on what works to gain engagement. Learn tips, tricks and resources to achieve success through MoxiWorks.
- Brand communications will highlight upcoming dates & times.

MoxiPresent is the industry-leading real estate comparative market analysis (CMA) tool that enables agents to seamlessly guide their clients through the home buying or selling journey. Its MLS integration provides agents with all the information they need to truly embrace their role as a trusted consultant in the eyes of their clients while appearing tech-savvy and innovative.

Numerous presentations are available for you. Listing/Seller presentations complete with your CMA, buyer tours, buyers' guides, recruiting presentations or get creative and create your own! The popular CB Buyer Locator is part of MoxiPresent and you can incorporate the information right into your presentation. Below are the resources to help you engage with this amazing tool!

## MOXIPRESENT FOR ADMIN

- Ongoing Instructor-Led virtual MoxiPresent classes for Admins: [Classes available for Registration](#)
- [Click here](#) to access self-paced eLearning MoxiPresent course for Admins
- Your [Quick Start Guide](#) for Brokers & Admins
- [Click Here to view Instructor Materials](#) including training PowerPoints complete with Scripts for use with your affiliated agents (Note: To view this tab in CBU<sup>SM</sup>, you must have Broker and/or Instructor and/or the non-sales position of Training Director in the dash Security Roles). Here is what's available:
  - MoxiWorks learning roll out guide
  - MoxiPresent CB Agent training presentation ppt
  - Leading a high functioning team
  - Uncovering buyers wants and needs
  - Touch campaigns that pay: SOI
  - Touch campaigns that pay: Past clients
  - Touch campaigns that pay: Farming
  - Winning at the kitchen table
  - Buyer consultations that win
  - Nailing the pricing conversation
  - Overcoming seller's commission objections

## MOXIPRESENT FOR AGENTS

- Ongoing Instructor-Led virtual MoxiPresent classes for Agents: [Classes available for Registration](#)
- MoxiPresent Success Portal provided MoxiWorks. [Click Here](#) to access resources
- [Click Here](#) to take advantage of the following guides:
  - Getting started guide
  - Getting started guide for teams
  - Switch user accounts guide
  - MoxiPresent Support and Access Infographic

## ADDITIONAL RESOURCES FOR MOXIPRESENT:

[Click Here](#) to learn how to create a buyer's tour in MoxiPresent

[Click Here](#) to learn how to do a deep search for your CMA, plus tips & tricks

[Click Here](#) to learn how to create a custom MoxiPresent page

[Click Here](#) to learn how to use MoxiPresent while on the road

[Click Here](#) to learn how to create a CMA in MoxiPresent

[Click Here](#) to learn how to integrate testimonials in MoxiPresent

[Click Here](#) to learn how to add/edit agent MLS info in Dash

[Click Here](#) to view Brand created content for MoxiPresent & more

The MoxiImpress suite makes marketing simple. These marketing tools engage agents to increase productivity by easily marketing their listings and their businesses, reaching more people, building stronger relationships with their prospects & clients and driving more business.

Each new listing receives a marketing email from MoxiWorks with all your marketing assets ready-made such as flyers, social post, video slide show, digital postcard, property website, eblast and more. All you must do, is take those ready-made assets and share them. Below are resources to help you engage with this marketing tool:

## MOXIIMPRESS FOR ADMIN

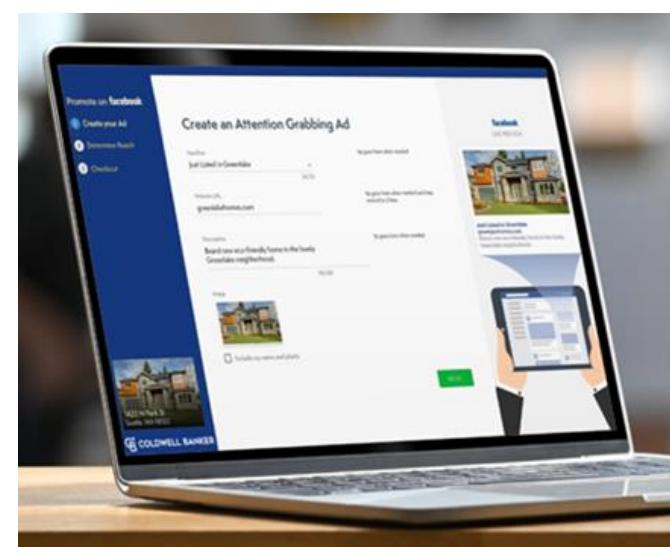
- Instructor-Led virtual MoxiImpress [Classes available for registration](#)
- Your [Quick Start Guide](#) for Brokers & Admins
- [Click Here to view Instructor Materials](#) including PowerPoints complete with Scripts for use with your affiliated agents (Note: To view this tab, you must have Broker and/or Instructor and/or the non-sales position of Training Director in the dash Security Roles). Here is what's available:
  - MoxiWorks learning roll out guide
  - MoxiImpress CB Agent training presentation ppt
  - Using the impersonation feature
  - Leading a high functioning team
  - Personal branding that works
  - Touch campaigns that pay: SOI
  - Touch campaigns that pay: Past clients
  - Touch campaigns that pay: Farming
  - Winning at the kitchen table

## MOXIIMPRESS FOR AGENTS

- Instructor-Led virtual MoxiImpress classes for agents [Classes available for registration](#)
- MoxiImpress Success Portal provided by MoxiWorks. [Click Here](#) to access the resources.
- [Click Here](#) to take advantage of the following guides:
  - Getting started guide
  - Getting started guide for teams

## ADDITIONAL RESOURCES

- [13 Tips for MoxiWorks Success](#)
- [Click Here](#) to view Brand created content for MoxiImpress & more



The MoxiEngage CRM tool is specifically designed to fit your unique selling needs. It leverages property data, encourages long term lead nurturing, drives repeat, and referral business & helps keep you on track to reach your sales goals. MoxiEngage offers you contact management, automated email marketing & campaigns, neighborhood news, goal setting, MLS integration, task recommendations & coaching along with a Manager dashboard.

## MOXIENGAGE FOR ADMIN

- Ongoing Instructor-Led virtual MoxiEngage class for admin [Classes available for Registration](#)
- [Click Here](#) to take advantage of the following guides:
  - Getting started guide – Manager checklist
  - Content Admin checklist
  - Adding/Editing Agent MLS ID and MLS Name in dash
- [Click Here to view Instructor Materials](#) including training PowerPoints complete with Scripts for use with your affiliated agents (Note: To view this tab in CBU<sup>sm</sup>, you must have Broker and/or Instructor and/or the non-sales position of Training Director in the dash Security Roles) Here is what's available:
  - MoxiWorks Learning rollout guide
  - MoxiEngage Agent training presentation ppt
  - Leading a high functioning team
  - Foundation of a successful business
  - Uncovering buyers want and needs
  - Touch campaigns that pay: SOI
  - Touch campaigns that pay: Past clients
  - Touch campaigns that pay: Farming
  - Winning at the kitchen table
  - Buyer consultations that win

## MOXIENGAGE FOR AGENTS

- Ongoing Instructor-Led virtual Weekly MoxiEngage class for agents [Classes available for Registration](#).
- MoxiEngage Success Portal, [Click Here](#) to access resources
- [Click Here](#) to take advantage of the following guides:
  - Getting started guide – Agent checklist and daily best practices for Engage
  - Getting started guide for teams
  - Switch user accounts guide

## ADDITIONAL RESOURCES

- [13 Tips for MoxiWorks Success](#)
- Here is a [First Time MoxiWorks Guide](#)
- [Neighborhood News](#) is the monthly market email drip campaign you can set and forget. Click link learn more about using this campaign.
- [Click Here](#) for a MoxiEngage Email Sync Overview
- [Click Here](#) to view Brand created content for MoxiEngage & more

MoxiWebsites is an easy-to-use website builder for agent & company sites that makes putting your best foot forward a simple task. The internet is now your prospects' go-to source to begin their home search and find the brokerage and agent to partner with for their journey. That makes it essential that you have a strong online presence that can be leveraged to communicate your value to prospects and spread brand awareness throughout your markets.

## MOXIWEBSITES FOR ADMIN

- [Click Here](#) to take advantage of the following guides:
  - Getting Started Guide
  - Dash Job Aids
- [Click Here](#) for Complete Walk Thru Guide for MoxiWebsites
  - [Click Here](#) to view Instructor Materials including training PowerPoints complete with Scripts for use with your affiliated agents (Note: To view this tab in CBU<sup>sm</sup>, you must have Broker and/or Instructor and/or the non-sales position of Training Director in the dash Security Roles) Here is what's available:
    - Learning Roll Out Guide
    - Website Agent Training Presentation ppt
    - Website basics
    - Boost your SEO: website content that climbs to the top
    - Leading a high-functioning team
    - Touch campaigns that pay: SOI
    - Touch campaigns that pay: Past clients
    - Touch Campaigns that pay: Farming

## MOXIWEBSITES FOR AGENTS

- Ongoing Instructor-Led virtual MoxiWebsites classes for agents [Classes available for Registration](#)
- MoxiWebsites Success Portal provided by MoxiWorks. [Click Here](#) to access
- [Click Here](#) to take advantage of the following guides:
  - Getting started guide
  - Getting started guide for teams
  - Switch user account guide

## HOW TO BOOST SEO ON YOUR MOXIWEBSITE

You've worked hard to get creative and leave your mark on your personalized MoxiWebsite. Now you need to work on getting the world to see it out in Google.

- [Click here](#) for a complete MoxiWebsite SEO playbook
- [Click Here](#) to learn more about the Yoast Plugin.

## ADDITIONAL RESOURCES

- [Click Here](#) to learn 13 Tips for MoxiWorks Success
- [Click Here](#) to learn how to Customize Your Agent Website
- [Click Here](#) for the Ultimate MoxiWebsites Guide for set-up and design. (For Leadership, Staff & Agents)
- [Click Here](#) to learn how to create a saved search as a consumer on website
- [Click Here](#) to learn about connecting your custom domain
- [Click Here](#) on Making Your Website Visible to the Public
- [Click Here](#) to learn How to Make your Website Secure with an SSL Certificate
- [Click Here](#) add **The Move Meter** and **CB Estimate** modules to your account to include on your MoxiWebsite.
- [Click Here](#) to learn how to de-duplicate your listings. Duplication of listings can happen when one company uses multiple MLS associations. Sometimes the same property will be listed in two or more MLSs. If you see multiple listings for the same property in your MoxiWorks account like on a Neighborhood News report or on your website, the cause is likely duplication.
- [Click Here](#) for step-by-step instructions on how to manually add testimonials & reviews to your Website
- [Click here](#) to view Brand created content for MoxiWebsites & more

# MOXITALENT®

Competition for top producers in today's market is hot, and you need to pull out all the stops to get them on your team. MoxiTalent is an automated talent identification tool that helps guide your recruiters and managers through the process of identifying, recruiting, and retaining the best agents for your brokerage.

## MOXITALENT FOR LEADERSHIP ONLY

- Ongoing Instructor-led virtual MoxiTalent class for admin [Classes available for Registration](#)
- Your [Getting started guide-Manager checklist](#) for MoxiTalent
- MoxiTalent Success Portal provided by MoxiWorks. [Click Here](#) to access resources
- [Click Here](#) to learn how to set your MoxiTalent goals
- [Click Here](#) to learn how to move people through the recruiting pipeline
- [Click Here](#) to Import your contacts directly into MoxiTalent

## LEADS ENGINE LEADS MANAGEMENT

A single unified solution for every aspect of leads management, from managing volume to gaining valuable insights to matching every lead with the right agent, all customized to your business.

### LEADS ENGINE

[Click Here](#) for a comprehensive Reference Guide describing each of the areas of Leads Engine:

- Dashboard, Settings, User Manager, Group Manager, Business Manager, Lead Manager & Business Insights

[Click Here](#) for a Team Manager Guide that will show you how to allow agents the option to share listing leads with other team members.

[Click Here](#) for a Guide that offers a brief overview, reminding you what each Manager Group is for.

[Click Here](#) for a guide regarding How to Manage Engagement Tracking

[Click Here](#) for Granting Access in Dash

[Click Here](#) for Leads Engine FAQ's



# PRODUCT CHAMPION

The Product Champion is a key role for any company in the deployment and engagement of the MoxiWorks platform. Our Product Champion learning tract entails what steps you can take to be successful, learn change management best practices and get a collection of resources to help deliver the MoxiWorks platform to your company/office.



A chance to hear from your peers on WHAT WORKS to gain engagement. Learn tips, tricks, and resources to achieve success through MoxiWorks. Brand communications will highlight upcoming dates & times.

- Monthly, Registration Required

- Click to register for [Product Champion Mastermind](#)
- To be added as a Product Champion for your company, please email Kohleen Nornes [Kohleen.nornes@cbhomeoffice.com](mailto:Kohleen.nornes@cbhomeoffice.com)

## YOUR MISSION AS A PRODUCT CHAMPION?

- Encourage usage & share success stories. Sharing the vision of a relationship-based sales methodology that focuses on the greatest source of growth: our sphere of influence.
- Help agents with questions and growth Ideas. Positive influence on adoption of and sustained use of the MoxiWorks platform by being knowledgeable, available & encouraging.
- Stay informed of new features & developments. Leverage resources provided to help your success such as Product Champion Mastermind, Product Champion's Corner, MoxiWorks Hours, etc.
- Share training materials & motivational content. Apply change management best practices to lead your company through the initial rollout onward to ongoing success.
- Support Managers and Leaders. The point person for your organization to help people learn and leverage MoxiWorks products.

# SUPPORT

## SUPPORT ON THE MOXIWORKS PLATFORM

MoxiWorks Customer Service Team is available for chat and calls Monday-Friday 6am to 5pm PST

Check out the comprehensive website [Support.MoxiWorks.com](http://Support.MoxiWorks.com)

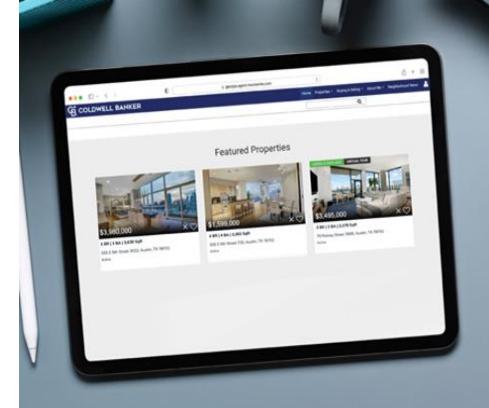
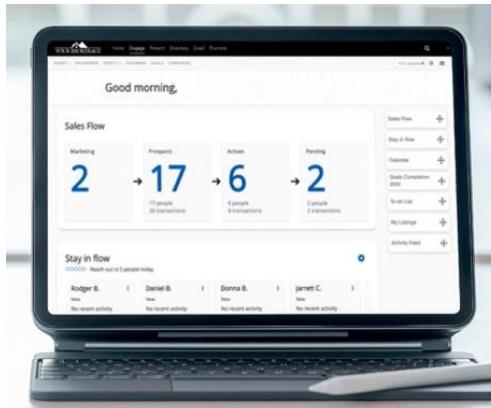
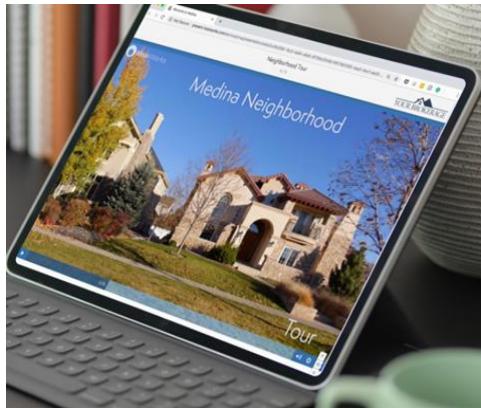
Helpful tips:

- [Click Here](#) to use Auto Bot for chat within [Support.Moxiworks.com](http://Support.Moxiworks.com) (this is a great resource to ask questions)
- [Click Here](#) to schedule a MoxiWorks Support Call
- [Click Here](#) to create a Support Ticket to report issues
- [Click Here](#) to learn about the MoxiWorks Help Center Success Portal

To learn what issues should I bring to Moxi  
vs the CB Help Desk [Click Here](#).

## MOXIWORKS RELATED EMAIL ADDRESSES:

- [moxiworkslaunch@anywhere.re](mailto:moxiworkslaunch@anywhere.re): Product Marketing team general mailbox. Anyone can send questions to this mailbox. Answers expected within 1 business day
- [moxiworkslaunch@anywhere.re](mailto:moxiworkslaunch@anywhere.re): Used to send launch communications \*affiliates add to safe sender list\*
- [mlsagreements@anywhere.re](mailto:mlsagreements@anywhere.re): MLS integration team general inbox
- [leadsengineteam@anywhere.re](mailto:leadsengineteam@anywhere.re): communicate directly with the Leads Engine support team.



# ADDITIONAL RESOURCES

- [Getting Started with MoxiWorks: Top Things to Know](#)
- [Ultimate MoxiWebsites Guide for Leadership, Staff & Agents](#)
- [13 Tips for MoxiWorks Success](#)
- [Click Here](#) to view Brand created content for MoxiWorks
- [Click Here](#) for January's monthly trainings
- CBU [Calendar](#): utilize this to share MoxiWorks classes with agents, staff & leadership
  - Click Agenda, at the top for an easy to read, weekly view. Click class to register or download as PDF with clickable links.
  - Create a class vs create an event: Utilize this calendar for your own office. To create a class, there must be a tile/subject already available in the CBU platform. An Event can be anything you like.
- Add: Move Meter & CB Estimate widgets can now be embedded onto your Moxi or personal website. Choose any of the following ways to showcase these tools:
  - Customizable webpage templates are available on MoxiWebsites.
  - Static modules can be found in the MoxiWebsite Module Library & added to an existing MoxiWebsite webpage, which can then be linked to your Move Meter or CB Estimate webpage.
  - You or a web developer can use embed codes to place these widgets on an existing MoxiWebsites webpage or a non-MoxiWebsite.
  - [Click Here](#) for complete instructions, for each of these options.
- [Click Here](#) to access your MoxiWorks Resource HUB complete with forms, checklists, recordings & job aids.
- [Click Here](#) to add/edit agent MLS in dash
- [Click Here](#) to learn about editing MoxiWorks permissions in dash
- [Click Here](#) for Leads Engine: Granting Access in dash
- [Click Here](#) for Instructions for MLS Agreements
- [Click Here](#) for MoxiWorks FAQ's
- [Click Here](#) for Leads Engine FAQ's
- [Click here](#) for a complete MoxiWebsite SEO playbook

# TESTIMONIALS

"I LOVE MOXI! THE WEBSITE BUILDER IS INCREDIBLY USER-FRIENDLY. I HAVE USED COMPETITORS FOR OTHER BUSINESS SITES IN THE PAST, AND NONE ARE AS EASY TO NAVIGATE AS MOXI! I WOULD RECOMMEND THIS PLATFORM TO ANYONE WITH THE OPPORTUNITY TO USE IT."

**ASHLEY SURLES**  
**COLDWELL BANKER TRADITIONS, WILLIAMSBURG VA**

"MOXIPRESENT HAS SUCH AMAZING FLEXIBILITY AND USER FRIENDLY! MAKES MY LIFE MUCH EASIER."

**CIANNA BURNETTE**  
**COLDWELL BANKER HIGH COUNTRY REALTY, BLUE RIDGE, GA**

"VERY HANDS ON AND EMPOWERING PLATFORM!"

**KEVIN KLEMM**  
**COLDWELL BANKER REALTY, NORTHERN CALIFORNIA**

"MOXIWORKS BASICALLY DOES EVERYTHING FOR ME!"

**SARAH DUKE**  
**COLDWELL BANKER REALTY, UTAH**

"MOXIPRESENT IS ONE OF THE BEST PRODUCTS OUT THERE...PERIOD!"

**CHAD LYON**  
**COLDWELL BANKER GRASS ROOTS REALTY, GRASS VALLEY, CA**

"GREAT PROFESSIONAL PRESENTATION WITH MOXIPRESENT, AND VERY EASY TO USE AND TO CUSTOMIZE. WE'VE GOTTEN TERRIFIC FEEDBACK FROM SELLERS ON THE CMA PACKAGE!"

**MARCIAS LAZARO**  
**COLDWELL BANKER REALTY, UTAH**

"USER FRIENDLY AND HELPFUL WITH SETTING UP BLOGS AND SO MUCH MORE!"

**CRYSTAL ZABEL**  
**COLDWELL BANKER PROFESSIONALS, MICHIGAN**

# January 2024

JAN  
02

## MoxiPresent 101: Getting Started

10:00AM-11:00AM EST | [click here to register](#)

This is the first in a series of two classes and is designed to help users navigate the tool and introduces the presentation setup wizard. Attendees will see a demonstration of how to use a provided template to create an IDX fed listing presentation with embedded CMA and learn how to share presentations through multiple channels.

## MoxiWebsites 101: Setting Up Your Website

11:00AM-12:00PM EST | [click here to register](#)

This is the first in a series of two classes and is designed to assist users in getting their website up and running! This class will teach how to setup your new website and take it live, understand the admin panel, manage website navigation, update your profile and secure your website to publish it with search engines.

JAN  
03

## Make the Most of Moxiworks Throughout the Sales Cycle

1:00PM-2:00PM EST | [click here to register](#)

Make the Most of MoxiWorks Throughout the Sales Cycle is a virtual instructor led course that provides an introductory overview of all products within the MoxiWorks Suite, discussing features within each product that may help agents generate leads, market to their sphere of influence, share new listings, customize presentations and manage transactions during the escrow period

## MoxiWebsites 201: Customizing Your Website

1:00PM-2:00PM EST | [click here to register](#)

An advanced course that teaches users how to customization techniques for their website, including adding video, property lists, custom searches, and testimonials. Note: it is highly recommended that users take MoxiWebsites 101 prior to attending this class.

## MoxiEngage 101: Maximize your SOI

2:00PM-3:00PM EST | [click here to register](#)

The first in a series of courses that are designed to teach you how to receive the most benefit from this powerful CRM. This introductory course showcases an overview of the agent dashboard with its sales cycle driven process, demonstrates how to connect your email to setup your MoxiEngage account and offers important information for managing your database of contacts.

## MoxiPresent 201: Customizing Presentations

4:00PM-5:00PM EST | [click here to register](#)

MoxiPresent 201 is an advanced course that demonstrates how to create custom content and custom presentation templates to take your presentations to the next level. Note: it is highly recommended that users take MoxiPresent 101 prior to attending this class.

## MOXI CLASSES

Week 1: 1/1/24-1/5/24

JAN  
04

## MoxiEngage 301:Leadership & Admins

10:00AM-12:00PM EST | [click here to register](#)

An employee-only course that walks through the Manager Dashboard, providing key insights on how to make the most of this powerful agent management tool and demonstrates how to use the campaign administration platform to create and publish marketing campaigns for agents and employees to use.

## MoxiEngage 201: Email Marketing

1:00PM-2:00PM EST | [click here to register](#)

This session demonstrates how to set up email marketing campaigns, such as holiday drip campaigns and others, send eCards and connect your contacts with property updates called "Favs and Saves". Students will have their best learning experience in this course if they have already completed MoxiEngage 101: Maximize Your SOI and followed the suggested steps to setup and organize their contact database.



# January 2024

JAN  
08

## MoxiEngage 101: Maximize your SOI 11:00AM-12:00PM EST | [click here to register](#)

The first in a series of courses that are designed to teach you how to receive the most benefit from this powerful CRM. This introductory course showcases an overview of the agent dashboard with its sales cycle driven process, demonstrates how to connect your email to setup your MoxiEngage account and offers important information for managing your database of contacts.

### Make the Most of Moxiworks Throughout the Sales Cycle

#### 1:00PM-2:00PM EST | [click here to register](#)

Make the Most of MoxiWorks Throughout the Sales Cycle is a virtual instructor led course that provides an introductory overview of all products within the MoxiWorks Suite, discussing features within each product that may help agents generate leads, market to their sphere of influence, share new listings, customize presentations and manage transactions during the escrow period

JAN  
09

## MoxiImpress

#### 11:00AM-12:00PM EST | [click here to register](#)

A powerful marketing platform that uses automation to instantly create a comprehensive marketing package for listings. This optional course provides a platform tour, demonstrates how to edit marketing packages, create new listings, and distribute the marketing via multiple channels. This course is appropriate for affiliated agents and employees alike.

## MoxiPresent 101: Getting Started

#### 4:00PM-5:00PM EST | [click here to register](#)

This is the first in a series of two classes and is designed to help users navigate the tool and introduces the presentation setup wizard. Attendees will see a demonstration of how to use a provided template to create an IDX fed listing presentation with embedded CMA and learn how to share presentations through multiple channels.

## MoxiWebsites 101: Setting Up Your Website

#### 4:00PM-5:00PM EST | [click here to register](#)

This is the first in a series of two classes and is designed to assist users in getting their website up and running! This class will teach how to setup your new website and take it live, understand the admin panel, manage website navigation, update your profile and secure your website to publish it with search engines.

JAN  
10

## MOXI CLASSES Week 2: 1/8/24-1/12/24

## MoxiEngage 201: Email Marketing

#### 11:00AM-12:00PM EST | [click here to register](#)

This session demonstrates how to set up email marketing campaigns, such as holiday drip campaigns and others, send eCards and connect your contacts with property updates called "Favs and Saves". Students will have their best learning experience in this course if they have already completed MoxiEngage 101: Maximize Your SOI and followed the suggested steps to setup and organize their contact database.

## MoxiImpress

#### 1:00PM-2:00PM EST | [click here to register](#)

A powerful marketing platform that uses automation to instantly create a comprehensive marketing package for listings. This optional course provides a platform tour, demonstrates how to edit marketing packages, create new listings, and distribute the marketing via multiple channels. This course is appropriate for affiliated agents and employees alike.

## MoxiWebsites 201: Customizing Your Website

#### 10:00AM-11:00AM EST | [click here to register](#)

An advanced course that teaches users how to customization techniques for their website, including adding video, property lists, custom searches, and testimonials. Note: it is highly recommended that users take MoxiWebsites 101 prior to attending this class.

## MoxiPresent 201: Customizing Presentations

#### 11:00AM-12:00PM EST | [click here to register](#)

MoxiPresent 201 is an advanced course that demonstrates how to create custom content and custom presentation templates to take your presentations to the next level. Note: it is highly recommended that users take MoxiPresent 101 prior to attending this class.

## ADDITIONAL MOXI CLASSES ADDED DAILY

Use the QR code below to visit CBU Learning Center for more options coming soon.

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# January 2024

JAN  
16

## MoxiPresent 201: Customizing Presentations

**10:00AM-11:00AM EST | [click here to register](#)**

MoxiPresent 201 is an advanced course that demonstrates how to create custom content and custom presentation templates to take your presentations to the next level. Note: it is highly recommended that users take MoxiPresent 101 prior to attending this class.

## Make the Most of Moxiworks Throughout the Sales Cycle

**11:00AM-12:00PM EST | [click here to register](#)**

Make the Most of MoxiWorks Throughout the Sales Cycle is a virtual instructor led course that provides an introductory overview of all products within the MoxiWorks Suite, discussing features within each product that may help agents generate leads, market to their sphere of influence, share new listings, customize presentations and manage transactions during the escrow period

## MoxiWebsites 201: Customizing Your Website

**4:00PM-5:00PM EST | [click here to register](#)**

An advanced course that teaches users how to customization techniques for their website, including adding video, property lists, custom searches, and testimonials. Note: it is highly recommended that users take MoxiWebsites 101 prior to attending this class.

## MoxiEngage 101: Maximize your SOI

**5:00PM-6:00PM EST | [click here to register](#)**

The first in a series of courses that are designed to teach you how to receive the most benefit from this powerful CRM. This introductory course showcases an overview of the agent dashboard with its sales cycle driven process, demonstrates how to connect your email to setup your MoxiEngage account and offers important information for managing your database of contacts.

## MOXI CLASSES

Week 3: 1/15/24-1/19/24

## ADDITIONAL MOXI CLASSES ADDED DAILY

Use the QR code below to visit CBU Learning Center for more options coming soon.

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# January 2024

JAN  
22

## MoxiPresent 101: Getting Started 1:00PM-2:00PM EST | [click here to register](#)

This is the first in a series of two classes and is designed to help users navigate the tool and introduces the presentation setup wizard. Attendees will see a demonstration of how to use a provided template to create an IDX fed listing presentation with embedded CMA and learn how to share presentations through multiple channels.

## MoxiWebsites 201: Customizing Your Website 2:00PM-3:00PM EST | [click here to register](#)

An advanced course that teaches users how to customization techniques for their website, including adding video, property lists, custom searches, and testimonials. Note: it is highly recommended that users take MoxiWebsites 101 prior to attending this class.

JAN  
23

## MoxiImpress 11:00AM-12:00PM EST | [click here to register](#)

A powerful marketing platform that uses automation to instantly create a comprehensive marketing package for listings. This optional course provides a platform tour, demonstrates how to edit marketing packages, create new listings, and distribute the marketing via multiple channels. This course is appropriate for affiliated agents and employees alike.

## MoxiEngage 201: Email Marketing 4:00PM-5:00PM EST | [click here to register](#)

This session demonstrates how to set up email marketing campaigns, such as holiday drip campaigns and others, send eCards and connect your contacts with property updates called "Favs and Saves". Students will have their best learning experience in this course if they have already completed MoxiEngage 101: Maximize Your SOI and followed the suggested steps to setup and organize their contact database.

JAN  
24

## MoxiWebsites 101: Setting Up Your Website 1:00PM-2:00PM EST | [click here to register](#)

This is the first in a series of two classes and is designed to assist users in getting their website up and running! This class will teach how to setup your new website and take it live, understand the admin panel, manage website navigation, update your profile and secure your website to publish it with search engines.

## MoxiPresent 201: Customizing Presentations 2:00PM-3:00PM EST | [click here to register](#)

MoxiPresent 201 is an advanced course that demonstrates how to create custom content and custom presentation templates to take your presentations to the next level. Note: it is highly recommended that users take MoxiPresent 101 prior to attending this class.

JAN  
25

## MoxiEngage 101: Maximize your SOI 1:00PM-2:00PM EST | [click here to register](#)

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### 4:00PM-5:00PM EST | [click here to register](#)

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# January 2024

JAN  
29

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## MoxiPresent 101: Getting Started

**1:00PM-2:00PM EST | [click here to register](#)**

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JAN  
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JAN  
31

## MOXI CLASSES Week 5: 1/29/24-1/31/24

### MoxiEngage 201: Email Marketing **1:00PM-2:00PM EST | [click here to register](#)**

This session demonstrates how to set up email marketing campaigns, such as holiday drip campaigns and others, send eCards and connect your contacts with property updates called "Favs and Saves". Students will have their best learning experience in this course if they have already completed MoxiEngage 101: Maximize Your SOI and followed the suggested steps to setup and organize their contact database.

### MoxiImpress

**2:00PM-3:00PM EST | [click here to register](#)**

A powerful marketing platform that uses automation to instantly create a comprehensive marketing package for listings. This optional course provides a platform tour, demonstrates how to edit marketing packages, create new listings, and distribute the marketing via multiple channels. This course is appropriate for affiliated agents and employees alike.



# LEAVE YOUR MARK



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# MOXIWORKS COURSE CATALOG FOR AFFILIATED AGENTS



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# MoxiWorks® Toolkit

Introduction to the MoxiWorks Toolkit	
Type	Title
Virtual Instructor Led Course	<b>Maximize the MoxiWorks Toolkit Throughout the Sales Cycle</b> Maximize the MoxiWorks Toolkit Throughout the Sales Cycle is a virtual instructor led course that provides an introductory overview of all products within the MoxiWorks Toolkit, discussing features within each product that may help affiliated agents generate leads, market to their sphere of influence, share new listings, customize presentations and manage transactions during the escrow period.
Guide	Sales Cycle Guide

MoxiWorks Toolkit Helpful Guides	
Type	Title
Guide	MoxiWorks: Updating Your Profile
Guide	Entering Agent License Information

# MoxiEngage®

MoxiEngage is a real-estate focused CRM (client relationship manager) that helps you stay close to your contact database through communication plans, digital marketing and important reminders. MoxiEngage also provides insights into your pipeline, tracking your progress towards goals. MoxiEngage courses are designed to be taken in order, allowing you to implement your new skills before you move to the next course to add additional knowledge. Microlearning videos and task-based guides are also available for quick, on demand information.

Virtual Instructor Led Course	
<b>MoxiEngage 101: Maximize Your SOI</b>	MoxiEngage 101: Maximize Your SOI is the first in a series of courses that are designed to teach you how to receive the most benefit from this powerful CRM. This introductory course showcases an overview of the agent dashboard with its sales cycle driven process, demonstrates how to connect your email to setup your MoxiEngage account and offers important information for managing your database of contacts.
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# MoxiEngage®

## Introduction to MoxiEngage

Type	Title
Video	Intro to MoxiEngage for Agent
Guide	MoxiEngage Support and Access Guide

## Getting Started with MoxiEngage

Type	Title
Video	MoxiEngage: Feature Navigation
eLearning	MoxiEngage eLearning for Agents

## MoxiEngage Contact Management

Type	Title
Guide	MoxiEngage: The Stay in Flow Module
Guide	MoxiEngage: Adding Contacts
Guide	MoxiEngage: Categorize Wizard
Guide	MoxiEngage: Contact Groups
Guide	MoxiEngage: Importing Contacts

## Manage Your Pipeline with MoxiEngage

Type	Title
Guide	MoxiEngage: From Marketing to Active in the Sales Flow
Guide	MoxiEngage: From Pending to Closing Transactions in the Sales Flow

# MoxiEngage®

MoxiEngage Email Marketing	
Type	Title
Video	MoxiEngage: Neighborhood News
Guide	MoxiEngage: Neighborhood News
Video	MoxiEngage: Listing Announcements
Guide	MoxiEngage: Listing Announcements
Video	MoxiEngage: Favs + Saves
Guide	MoxiEngage: Sharing Properties with Contacts (Favs + Saves)
Guide	MoxiEngage: Email Campaigns

# MoxiPresent®

MoxiPresent is a presentation system designed to help affiliated agents create dynamic, interactive digital or print presentations. MoxiPresent offers many presentation types including listing presentations with IDX fed CMA data that is updated in real time, Buyer Tours with an embedded feedback tool, Buyer Consultations and more. MoxiPresent is taught through several virtual courses which are designed to be taken in order, as each course builds upon the knowledge learned in previous session. Microlearning videos and task-based guides are also available for quick, on demand information.

## Virtual Instructor Led Course

### MoxiPresent 101: Getting Started

This is the first in a series of two classes and is designed to help users navigate the tool and introduces the presentation setup wizard. Attendees will see a demonstration of how to use a provided template to create an IDX fed Listing Presentation with embedded CMA and learn how to share presentations through multiple channels.

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Note: It is highly recommended that users take MoxiPresent 101 prior to attending this class. MoxiPresent 201 is an advanced course that demonstrates how to create custom content and custom presentation templates to take your presentations to the next level.

# MoxiPresent®

## Introduction to MoxiPresent

Type	Title
Video	Introduction to MoxiPresent - Agent
Guide	MoxiPresent Support & Access Guide

## Getting Started with MoxiPresent

Type	Title
Video	MoxiPresent: Navigation for Agents
Guide	MoxiPresent: Presentation Types (Templates)
eLearning	MoxiPresent eLearning for Agents

## Working with Templates in MoxiPresent

Type	Title
Guide	MoxiPresent: Presentation Quick Start Guide
Guide	MoxiPresent: Customizing a Presentation
Guide	MoxiPresent: Adding Properties to a CMA

## Creating Custom Presentations in MoxiPresent

Type	Title
Guide	MoxiPresent: Saving Presentation Templates

# MoxiWebsites®

MoxiWebsites are ready-to-go, IDX powered real estate websites that feature property searches, buying and selling information, affiliated agent bios and so much more, all in a fully customizable yet template based system. The courses are designed to be taken in order, allowing you to implement your new skills before you move to the next course to add additional knowledge. Microlearning videos and task-based guides are also available for quick, on demand information.

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## Introduction to MoxiWebsites

Type	Title
Video	Intro to MoxiWebsites for Agents
Guide	MoxiWebsites Support and Access Guide

## Getting Started with MoxiWebsites

Type	Title
Guide	Activate Your Website
Video	MoxiWebsites: Feature Navigation
eLearning	MoxiWebsites eLearning for Agents
Guide	MoxiWebsites: Property Searches
Guide	MoxiWorks: Updating Your Profile

# MoxiWebsites®

## Customizing Your Website

Type	Title
Guide	Customizing Your MoxiWebsites (101 Job Aid)
Guide	Personalize Your Homepage
Guide	Create and Share Custom Pages
Guide	Create and Display Property Lists

## Marketing Your Website

Type	Title
Guide	MoxiWebsites: Sharing Listings on Social Media
Guide	MoxiWebsites: Sharing Property Lists on Social Media
Guide	MoxiWebsites: Sharing Custom Searches on Social Media
Guide	MoxiWebsites: Sharing Blog Content on Social Media
Guide	MoxiWebsites: Sharing Buying or Selling Info on Social Media
Guide	MoxiWebsites: Sharing Testimonials on Social Media
Guide	MoxiWebsites: Sharing Open Houses on Social Media

# MoxilImpress®

MoxilImpress is a powerful marketing platform that uses automation to instantly create a comprehensive marketing package for listings. These marketing packages include items such as flyers, slideshows, social media images and more, and are ready to be shared via print or online or can be easily customized to suit affiliated agent preferences.

## Virtual Instructor Led Class

### Impressive Marketing with MoxilImpress

Impressive Marketing with MoxilImpress provides a comprehensive platform tour, introducing agents and brokers to the full selection of marketing materials that are instantly created for new listings through MoxilImpress's IDX feed. This course is appropriate for agents and employees alike.

## Introduction to MoxilImpress

Type	Title
Video	Intro to MoxilImpress for Agents
Guide	MoxilImpress Support & Access Guide

# Moxilmpress®

## Getting Started with Moxilmpress

Type	Title
eLearning	Moxilmpress eLearning for Agents
Guide	Moxilmpress: Impersonation

## Marketing with Moxilmpress

Type	Title
Guide	Moxilmpress: Printing Open House Flyers
Guide	Moxilmpress: Creating and Sharing Social Media Content

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# MOXIWORKS COURSE CATALOG

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Guide	Sales Cycle Guide

## MoxiWorks Toolkit Helpful Guides

Type	Title
Guide	MoxiWorks: Updating Your Profile
Guide	Entering Agent License Information
Guide 	Switch User Account Guide

 **Broker/Admin Specific Course**

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### MoxiEngage 301: MoxiEngage for Brokers and Admins

Note: It is strongly suggested that MoxiEngage 101 and 201 are taken prior to this course. MoxiEngage 301 is an affiliated employee-only course that walks through the Manager Dashboard, providing key insights on how to make the most of this powerful agent management tool and demonstrates how to use the campaign administration platform to create and publish marketing campaigns for agents and employees to use

# MoxiEngage®

Introduction to MoxiEngage	
Type	Title
Video	Intro to MoxiEngage for Agents
Guide	MoxiEngage Support and Access Guide
Video (B)	Intro to MoxiEngage for Brokers

Getting Started with MoxiEngage	
Type	Title
Video	MoxiEngage: Feature Navigation
eLearning	MoxiEngage eLearning for Agents
eLearning (B)	MoxiEngage Manager/Admin eLearning

MoxiEngage Contact Management	
Type	Title
Guide	MoxiEngage: The Stay in Flow Module
Guide	MoxiEngage: Adding Contacts
Guide	MoxiEngage: Categorize Wizard
Guide	MoxiEngage: Contact Groups
Guide	MoxiEngage: Importing Contacts

Manage Your Pipeline with MoxiEngage	
Type	Title
Guide	MoxiEngage: From Marketing to Active in the Sales Flow
Guide	MoxiEngage: From Pending to Closing Transactions in the Sales Flow

# MoxiEngage®

MoxiEngage Email Marketing	
Type	Title
Video	MoxiEngage: Neighborhood News
Guide	MoxiEngage: Neighborhood News
Video	MoxiEngage: Listing Announcements
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<b>MoxiPresent 301: Introduction to Content Admin Access</b>  This course provides a tour of the administrative side of MoxiPresent, shares tutorials for developing custom content for agent and/or employee use and direction on how to properly set permissions for the right people, in the right locations, to have access to the right content for their business needs.

# MoxiPresent®

## Introduction to MoxiPresent

Type	Title
Video	Introduction to MoxiPresent - Agent
Guide	MoxiPresent Support & Access Guide
Video (B)	Introduction to MoxiPresent - Broker

## Getting Started with MoxiPresent

Type	Title
Video	MoxiPresent: Navigation for Agents
Guide	MoxiPresent: Presentation Types (Templates)
eLearning	MoxiPresent eLearning for Agents
Video (B)	MoxiPresent: Navigation for Brokers + Admins
eLearning (B)	MoxiPresent for Content Admins

## Working with Templates in MoxiPresent

Type	Title
Guide	MoxiPresent: Presentation Quick Start Guide
Guide	MoxiPresent: Customizing a Presentation
Guide	MoxiPresent: Adding Properties to a CMA

## Creating Custom Presentations in MoxiPresent

Type	Title
Guide	MoxiPresent: Saving Presentation Templates
Guide (B)	MoxiPresent: Customizing a Recruiting Presentation

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## Introduction to MoxiWebsites

Type	Title
Video	Intro to MoxiWebsites for Agents
Guide	MoxiWebsites Support and Access Guide
Video 	Intro to MoxiWebsites for Brokers

## Getting Started with MoxiWebsites

Type	Title
Guide	Activate Your Website
Video	MoxiWebsites: Feature Navigation
eLearning	MoxiWebsites eLearning for Agents
Guide	MoxiWebsites: Property Searches
Guide	MoxiWorks: Updating Your Profile
eLearning 	MoxiWebsites for Brokers
Video 	MoxiWebsites: Broker*

# MoxiWebsites®

## Customizing Your Website

Type	Title
Guide	Customizing Your MoxiWebsites (101 Job Aid)
Guide	Personalize Your Homepage
Guide	Create and Share Custom Pages
Guide	Create and Display Property Lists

## Marketing Your Website

Type	Title
Guide	MoxiWebsites: Sharing Listings on Social Media
Guide	MoxiWebsites: Sharing Property Lists on Social Media
Guide	MoxiWebsites: Sharing Custom Searches on Social Media
Guide	MoxiWebsites: Sharing Blog Content on Social Media
Guide	MoxiWebsites: Sharing Buying or Selling Info on Social Media
Guide	MoxiWebsites: Sharing Testimonials on Social Media
Guide	MoxiWebsites: Sharing Open Houses on Social Media

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## Introduction to Moxilpress

Type	Title
Video	Intro to Moxilpress for Agents
Guide	Moxilpress Support & Access Guide
Video 	Intro to Moxilpress for Brokers

# MoxiImpress®

## Getting Started with MoxiImpress

Type	Title
eLearning	MoxiImpress eLearning for Agents
Guide	MoxiImpress: Impersonation
Video 	MoxiImpress: Using the Impersonation Feature

## Marketing with MoxiImpress

Type	Title
Guide	MoxiImpress: Printing Open House Flyers
Guide	MoxiImpress: Creating and Sharing Social Media Content

# MoxiTalent®

MoxiTalent is a dashboard located within select employee MoxiEngage accounts. This IDX powered feature assists recruiting managers in identifying agents they may want to recruit.

## Live Virtual Class

### MoxiTalent: Intro for Brokers and Admins

The MoxiTalent course teaches how to use the agent profile search feature to locate agents who exhibit the business behavior outlined in the search and save them to a dashboard specially designed to move agents through a proven recruiting process. We strongly suggest that users completing MoxiEngage 101 and 201 prior to attending so users have an existing understanding of the MoxiEngage CRM features and functions.

## Introduction to MoxiTalent

Type	Title
Video 	Intro to MoxiTalent for Brokers
Guide 	MoxiTalent Support and Access Guide

# MoxiTalent®

## Getting Started with MoxiTalent

Type	Title
Video 	MoxiTalent Navigation
Guide 	Getting Started Guide - Manager Checklist

## MoxiTalent Recruiting Tasks

Type	Title
Guide 	MoxiTalent: Creating Recruiting Search Profiles
Guide 	MoxiTalent: Adding Potential Recruits to a Drip Campaign
Guide 	MoxiTalent: Potential Recruits and the Sales Flow
Guide 	MoxiPresent: Customizing a Recruiting Presentation