



MAXTECH Lead Concierge Agent FAQ

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MAXTech Lead Concierge Overview FAQ

What is MAXTech Lead Concierge?

Lead Concierge services is designed to (1) improve the REMAX customer experience for remax.com visitors who request information but never hear back, (2) support REMAX agents who are unable to respond to inquiries right away, and (3) ensure that incoming leads are skillfully nurtured into conversation-ready buyers offered back to the listing agent.

How does the Lead Concierge program work?

Currently, when a non-REMAX listing lead comes into remax.com, a concierge immediately reaches out to establish contact. The concierge works to qualify the lead, and once the lead is deemed conversation-ready, the concierge passes it to an opted-in agent. If the agent closes a sale, they pay a 30% referral fee.

Starting May 12, the Lead Concierge team will begin processing leads generated from REMAX listings.

Has MAXTech Lead Concierge been successful*?

Yes! In just over eight months, MAXTech Lead Concierge has seen these results:

- Thousands of agents across the United States have opted in to the program.
- More than 30,000 workable leads have passed through the concierges, with more than half of those leads deemed conversation-ready and delivered to an opted-in agent.
- This has led to more than **250 closings** for REMAX agents.

**Data provided by Inside Real Estate for leads generated on remax.com that are concierge eligible, have been contacted by the Lead Concierge program, and delivered to participating offices when conversation-ready, from 8/1/24 – 4/15/25. Concierge determines when a lead is “conversation-ready” based on a valid phone number and factors relevant to the lead’s intent to buy or sell.*

What issues does Lead Concierge address?

Consumer expectations continue to evolve, and in this age of instant results, they expect an immediate response. MAXTech Lead Concierge solves two main issues with online leads. First, leads processed through the concierge are high-quality, vetted leads that are worth an agent’s time and attention. Second, consumers can enjoy a better customer experience by getting an immediate response from a live person.

What are the benefits of MAXTech Lead Concierge*?

- A lead responds to a concierge 66% of the time vs. 12% with an agent.
- Leads respond more than once with a concierge 36% of the time vs. 4% of the time with an agent.
- A concierge calls or texts 96% of the time with a lead within 24 hours vs. 19% of the time with just an agent.
- A concierge makes two attempts in the first 24 hours. On average, an agent makes 0.6 outreach attempts in the first 24 hours.

**Data provided by Inside Real Estate comparing current users of their concierge service and their activities before and after using the service.*

REMAX Listing Leads FAQ

What is happening?

Beginning May 12, 2025, the MAXTech Lead Concierge program is expanding its range to include properties listed on remax.com by REMAX affiliates.

How does the process work with REMAX listing leads?

A remax.com lead generated by a REMAX listing will always be routed first to the listing agent. In the new framework, the listing agent will have 15 minutes to accept the lead. If the agent accepts it within 15 minutes, they work the lead as they see fit. The Lead Concierge team will not get involved.

What happens if the listing agent does not accept a lead within 15 minutes?

After 15 minutes of inactivity, the lead will go to the Lead Concierge team – who will immediately begin their process of qualifying and nurturing the lead. After the lead is nurtured – which could take months to complete – the concierge will offer the cultivated lead to the listing agent again. The listing agent will be given the option to opt into the Lead Concierge program, if they are not already enrolled, and has 60 minutes to accept the lead, subject to the 30% referral fee for the service of warming up and vetting the lead. The lead from the concierge will need to be accepted between 8 a.m.-8 p.m. in the agent's time zone.

If the listing agent chooses to decline the lead or not to opt into Lead Concierge, it will go to an opted-in agent or next best performing agent in the same office or brokerage, who has 60 minutes to accept the lead, in the agent's time zone between 8 a.m.-8 p.m.

What happens if a REMAX listing lead comes in after hours? Does it have to be always accepted before it's sent to the concierge?

REMAX listing leads must be accepted within 15 minutes, regardless of time. Leads must be accepted 24/7.

Why does a REMAX Listing Lead need to be accepted 24/7?

Answering leads matters:

- Studies show that nearly 50% of real estate leads are never followed up on, and if they are, the average response time is more than 15 hours.*
- The likelihood of connecting with a lead increases 100 times if they are called within the first 5 minutes, as compared to waiting for 30 minutes.**

Concierges are available around the clock:

- MAXTech Lead Concierge is a service provided to benefit agents by providing high-quality, vetted leads from the concierge. The concierges are available 24/7, making sure no lead is lost or goes unanswered.

No response or a late response isn't good for anyone:

- It raises the bar for customer experience. By contacting leads immediately with an actual person, it ensures the best possible service and conversion rates for agents, while setting REMAX apart from competitors.

Most listing leads come to remax.com during business hours:

- Almost 9 out of 10 listing leads from remax.com come in between the hours of 8 a.m. and 8 p.m. PT.***

**According to a study by the WAV Group*

***According to NAR*

**** Based on remax.com listing leads from April 2024 to April 2025*

What are the lead acceptance rules for non-REMAX Listing Leads?

Non-REMAX listing leads need to be accepted between 8 a.m. and 8 p.m. in the agent's time zone. If a lead comes in after hours, it will be sent to the agent at 8 a.m. the following day and needs to be accepted.

For non-REMAX listing leads:

- The agent will have 15 minutes to accept. If not accepted, the agent will be sent a follow-up text to accept the lead.
- If not accepted after one hour, the agent will receive a final text giving them another 60 minutes to accept the lead, or it will be reassigned.
- If the lead comes in after-hours, the agent will be sent the lead the following day and have 60 minutes to accept the lead, or it will be reassigned.

How does a REMAX affiliate opt into MAXTech Lead Concierge to receive Lead Concierge-eligible leads from remax.com?

- Go to MAXTech powered by BoldTrail through MAXCenter
- Navigate to the BoldTrail Marketplace
- Click on the MAXTech Lead Concierge tile
- Opt in

Can a broker, agent, team or office opt out from having their listing leads being included in the concierge program?

Not at this time.

What happens if a listing agent declines a concierge lead and it goes to another opted in agent in the office, who sends the lead back to the listing agent?

If the listing agent closes the lead, they would need to pay the 30% referral.

Are leads that come directly to a team or agent through their personalized site hosted by MAXTech powered by BoldTrail eligible for Lead Concierge?

Not currently. These leads will not be processed through the MAXTech Lead Concierge program.

Does the MAXTech Lead Concierge lead routing override office lead routing?

Yes. For eligible leads, Lead Concierge lead routing will be followed. For leads that don't meet the criteria, office lead routing will still be followed.

How are leads that are worked by Lead Concierge routed to offices?

REMAX listing leads will always first be offered to the listing agent to accept. Non-REMAX listing leads will first go to offices in the area with an opted-in agent. If there are no opted-in agents, the agent in the same brokerage with the highest engagement inside MAXTech powered by BoldTrail will receive the lead and the option of opting into the program.

How is highest engagement determined?

This is determined by those who have logged in at least five separate days over the past 30 days, and have taken an action on a contact within MAXTech powered by BoldTrail.

[Non-REMAX Listing Leads FAQ](#)

How does the Lead Concierge program work with non-REMAX listing leads?

When a non-REMAX listing lead comes into remax.com, has a confirmed phone number and is not a rental, a concierge immediately reaches out to establish contact. The concierge works to qualify the lead, and once the lead is deemed conversation-ready, the concierge passes it to an opted-in agent. If the agent closes a sale, they pay a 30% referral fee.

How do agents opt in to participate in the Lead Concierge program?

Agents can opt in and out anytime via the Marketplace tile inside MAXTech powered by BoldTrail.

To get there:

- Go to MAXTech powered by BoldTrail
- Navigate to the Marketplace
- Click on the MAXTech Lead Concierge tile

What happens after an agent opts into the program?

They will receive a confirmation email that includes the referral terms, as well as directions on what to do when they get a new referral.

This email will come from max-tech-lead-concierge-support@customerconcierge.com. You can also see it below.



(844) 221-7655

Congratulations Aaron Test-Jacobson, you've opted in to the MAX/Tech Lead Concierge program!

What's Next?

Review the terms that you've agreed to as part of the MAX/Tech Lead Concierge program. Reminder: this service has no upfront cost, just a 30% referral fee on each successful closing. Full referral terms are available at www.customerconcierge.com/referral-agreement

Accepting New Referrals

When a conversation-ready lead is assigned, you will be notified via text (from [310-620-6694](tel:310-620-6694)) and email (from maxtech-lead-concierge@customerconcierge.com). You will have the option to **accept** or **decline** the referral. Please be sure to accept the referral within 15 minutes. If we don't hear from you in a timely manner, that referral may be reassigned to another participating agent.

Conversation-Ready Contacts

Once accepted, log into your MAX/Tech powered by kvCORE platform. The new referral will appear in your Smart CRM with a hashtag indicating it's been #concierge_qualified. You'll also see a banner in the Contact history noting what action is required ("Needs Appointment," "Needs Attention," etc.) The Contact history also shows any concierge notes, texts, and calls. Answers to qualification questions – such as timeline, pre-approval, and if they are working with an agent – appear in the left panel sidebar.

Logging Activity

Logging all calls, texts, and email communications on the Contact record in MAX/Tech powered by kvCORE is crucial. Your status updates and logged activity directly influence our outreach to the lead via the Referral Specialist Team, ensuring you and the client are on the right track to closing the deal!

We're excited to work with you!

MAX/Tech Lead Concierge
max-tech-lead-concierge-support@customerconcierge.com

What other communications will agents get from Inside Real Estate?

Agents will receive emails when:

- They get a referral to accept
- They've accepted a referral*
- 24 hours after they've accepted a referral*

- They need to make a status update on a referral
- They have a client in escrow*
- They have closed escrow*
- They have paid the referral fee*

*Primary Broker/Team Leader will be CC'd on these.

[Click here to see examples of the emails Inside Real Estate will send.](#)

Can agents or teams opt out of Lead Concierge for non-REMAX Listing Leads?

Agents are not required to participate.

How does it work for leads that are already in an agent's or team's MAXTech powered by BoldTrail?

The concierge will qualify and warm only the leads generated through remax.com. If a lead contacts an agent directly and the agent adds the lead to their CRM, the concierge will not get involved – and there will be no referral fee if that lead closes.

Are leads that come direct to a team or agent through their personalized MAXTech powered by BoldTrail-hosted site MAXTech concierge eligible?

Not at this time. These leads will not go through the MAXTech Lead Concierge program.

If an agent doesn't opt in, does this mean they'll get only rental leads or those without a phone number?

No. These agents will continue to receive leads who don't qualify for the concierge program, including leads whose preference is to be contacted by email. The concierge only contacts leads via phone or text.

When do non REMAX listing leads need to be accepted from the concierge?

These leads will need to be accepted between 8 a.m. and 8 p.m. in the agent's time zone. If a lead comes in after hours, it will be sent to the agent at 8 a.m. the following day and needs to be accepted.

Is responding to the lead concierge via text message enough to accept a lead, or must agents make an update inside MAXTech powered by BoldTrail?

Ideally the agent will make status updates inside MAXTech powered by BoldTrail. But a simple reply to the text or email alert is sufficient to get the lead handed over to the agent.

How long does the agent have to accept the lead from the concierge?

- The agent will have 15 minutes to accept. If not accepted, the agent will be sent a follow-up text to accept the lead.
- If not accepted after one hour, the agent will receive a final text giving them another 60 minutes to accept the lead, or it will be reassigned.
- If the lead comes in after hours, the agent will be sent the lead the following day and have 60 minutes to accept the lead, or it will be reassigned.

What happens if the concierge lead isn't accepted?

If the original agent does not accept the lead, the lead will be assigned to another opted-in agent in the office. This agent will get the same cadence of messages and have the same amount of time to accept the lead.

If there are multiple opted-in agents in a market, how do the leads get distributed?

The leads will be distributed evenly through a round robin format. Over time, the leads will be optimized and delivered through a weighted system to agents who have had the most success in the program.

What happens if there are no other opted-in agents in the office?

Inside Real Estate will work to find other highly engaged agents within the same office who have not opted in. The agent would opt in upon accepting the new referral.

What if there are no highly engaged agents in the same office?

Inside Real Estate will expand its search to all qualified REMAX agents within a 30-mile radius.

What happens if there are no agents in an office or area that have opted into the program?

Inside Real Estate will work to find a highly engaged agent within the office to opt in and accept the referral. If there are no highly engaged agents in the office, Inside Real Estate will expand its search to all qualified REMAX agents within a 30-mile radius.

Does the MAXTech Lead Concierge lead routing override office lead routing?

Yes. For any eligible leads, Lead Concierge lead routing will have precedence. For leads that don't meet the criteria, office lead routing will be followed.

Does the concierge have contact with the lead after passing it to an agent?

Once passed to an agent, the concierge won't have any contact with the agent or lead. At that point a member of the Inside Real Estate Referral Network Team will engage with the lead and

agent directly. The Referral Network Team works to monitor and track the status of the lead to ensure both the agent and client are having a good experience.

What happens once a lead is passed off from Lead Concierge?

Once a lead is warmed up and delivered from the concierge, the agent is notified via text message and email. These leads will also have the hashtag #concierge_eligible, #concierge_contacted, or #concierge_qualified inside MAXTech powered by BoldTrail.

The message will come from Inside Real Estate's Referral Network via email from maxtech-lead-concierge@customerconcierge.com, and a text from 310-620-6694 that provides the lead's contact details.

The assigned lead will also say "MAXTech Lead Concierge" as the referrer.

The agent's details are also emailed/texted to the lead.

Once handed to the agent, will the lead's contact information be updated in MAXTech powered by BoldTrail?

Once inside MAXTech powered by BoldTrail, a red bell appears next to the assigned lead, along with a banner in the Contact history noting that an action is required ("Needs Appointment," "Needs Attention," etc.). The Contact History also displays all concierge notes, texts, and calls. The lead's answers to qualification questions – such as timeline, pre-approval, and if they are working with an agent – appear in the left panel sidebar.

What should agents or teams do once they've received the lead?

After accepting, agents should log all calls, texts, and email communications with the lead into the Contact Record in MAXTech powered by BoldTrail from either the desktop or branded mobile app.

The Inside Real Estate Referral Network Team stays updated on this activity and assists in keeping the agent and the client connected. It's important for an agent to update the system with any contact they have with the lead, which lets the referral team know the process is moving forward.

How does an agent update the lead status?

Agents update lead activity in [Contact Statuses](#) via the Contact profile in the Smart CRM.

Agents should update the status frequently to help ensure that buyers and sellers receive a great experience. This should be done when [logging calls](#), [sending and responding to text messages](#) and [adding notes](#) when the concierge team requests a status update.

If a lead opts out, it's important that the agent tag the lead as opted out as soon as possible.

What happens if the agent doesn't track communication in MAXTech powered by BoldTrail?

Agents are encouraged to log all information inside the platform. If the agent doesn't log information inside the platform, the Referral Network Team will periodically check in with the agent to confirm they are communicating with the lead and request that updates be made.

What happens if the Referral Network Team does not receive updates?

They will continue to follow up with the consumer and agent periodically via email and text if a referral remains active.

What happens if an agent accepts the lead but does not get back to the lead?

The Referral Network Team will reach out to the agent and ask them to contact the lead as soon as they can. If the consumer requests another agent, they are rerouted to other agents in the office who have opted into the program.

In cases of foreign-language barriers or other lead-specific requirements, the concierge may reach out to the broker or office admin for any additional insights before transferring a lead.

How will this impact Smart Campaigns?

Once a concierge lead enters the MAXTech powered by BoldTrail system and is qualified and assigned, default Smart Campaigns are turned off.

Agents, however, may manually place the contact on any Smart Campaign they choose.

Is there a way to make sure concierge qualified leads aren't placed on a Smart Campaign?

Several default Smart Campaigns treat any lead as brand new. The best practice is to put an exclusion on #concierge_eligible leads in case some contacts still show a New Lead status even after qualification.

Can an agent pass a lead to someone else?

Yes. This requires them to transfer the lead within MAXTech or to reach out to the Inside Real Estate referral team via text/email in order to have them facilitate this.

If Agent A transfers a lead to another agent in the same office (Agent B), acceptance notification and referral details will be sent to Agent B. If Agent B closes the deal, they would be responsible for the referral fee.

If Agent A wanted to refer a lead to another brokerage, they should contact Inside Real Estate to help reassign the lead.

If agent A does not inform Inside Real Estate they have transferred the lead, and it closes with another agent, Agent A would still be responsible for paying a referral fee.

Can these leads be reassigned?

If no contact/update has been made in five days, and there is no signal on the profile, the Inside Real Estate Referral Network Team will check in with the lead. If they ask for a new agent at that point, the lead may be re-assigned to another opted-in agent.

Where can someone go for support?

- Access the blue chat bubble within your MAXTech powered by BoldTrail account.
- **Online:** [MAXCenter](#) > Customer Support (link in left column) > “Chat with an Expert” or “Submit a Case”
- **Text/Call:** (888) 398-7171

What happens if someone has dual agent status?

Dual agents with unique profiles can opt in as they'll have profiles in each market. Dual agents with only one profile cannot opt in to their secondary market. Work is underway to find a solution to this.

MAXTech Lead Concierge Referral Fee Agent FAQ

How does Inside Real Estate know when a lead concierge referral closes?

The Referral Network Team monitors the activity an agent logs in MAXTech powered by BoldTrail and keeps in touch with the agent. Those stages trigger additional follow-ups based on how close the customer is to a transaction.

The concierge audits title searches, reverse phone lookups and change of address to verify if leads they have qualified and warmed end up purchasing a property.

How does the referral fee work?

The broker is the entity responsible for issuing the payment since they handle the actual commissions. The payment is typically initiated by an escrow agent, title company or closing attorney at the time of closing. The only instances where an agent may pay directly would be if it was missed at closing and later determined that the referral fee was payable. In that case the agent might submit payment directly since the broker has already issued their net commission check.

How do agent pay the referral fee?

Referral fee checks and closing disclosure statements can be sent to:

Via USPS:

BTRN LLC

PO BOX 778934

Chicago, IL 60677-8934

Via Overnight/Courier Address:

BTRN LLC

Lockbox Number 778934

350 East Devon Ave.

Itasca, IL 60143

There are also options for ACH/Wire transfer. To receive instructions or to send closing statements, email escrow-max-tech-lead-concierge@customerconcierge.com.

How long does a Referral Fee period last?

Any lead that enters the Lead Concierge program is subject to the referral fee for a transaction within two years of the concierge qualifying and warming the lead. The period begins when the agent is first handed the lead. If an agent assists a referred client with the sale of one property and the purchase of another within two years of receiving the lead, they agree to pay the same referral fee for both transactions. No referral fee is due on any subsequent transactions with the referred client. For example, if an agent assists a referred client with two purchase transactions, no referral fee is due on the second purchase transaction.

What happens if a lead has been qualified by another concierge service? If it closes will the agent have to pay a referral fee to multiple concierge services?

No. If another lead source sends a client after MAXTech Lead Concierge has already assigned it, a referral won't be due to both. Referral-based programs all have similar verbiage of what they need to do to prove to they already have a preexisting client relationship. If this comes up,

Inside Real Estate can provide any documentation to the other referral program to when they accepted the referral.

MAXTech Lead Concierge Process and Staff Procedure FAQ

What leads are included in the Lead Concierge process?

Leads must meet the following criteria:

1. Has a confirmed phone number
2. Is not a rental

How are the leads qualified?

Leads are qualified by their location, price preference, motivation to act, agent commitment status, mortgage readiness and desire to set up an appointment.

How are leads disqualified?

Leads are disqualified for the following reasons:

1. Invalid contact information
2. Lead is working with another agent
3. Lead asks not to be contacted
4. Lead has opted out

What types of questions does the concierge ask to warm and qualify the lead?

The concierge asks questions to determine where a consumer is in the process and to get as much information as possible for the agent. They will ask questions like:

- What are your goals related to real estate right now?
- What areas are of most interest to you?
- What is your timeline to purchase?
- Have you been preapproved for a mortgage?
- Do you have a home to sell?
- Are you currently working with an agent?

Who are the concierges?

The concierges are U.S.-based Inside Real Estate employees across the country. They are not automated.

What information does the concierge have access to within MAXTech powered by BoldTrail?

When the lead is assigned to an agent, the concierge can see the office name, office website, email and phone number but only within their proprietary software – not within the individual platform/user account. They do not have visibility into any notes/details added by the Broker/Owner or Admin. After the lead is vetted and routed to the agent, the concierge no longer has access to any information on that lead, office, or agent.

Once the lead is assigned, a member of the Inside Real Estate referral team works directly with the agent and consumer.

How many leads will Lead Concierge qualify and warm a month/year for an office? Concierges will qualify and warm all leads routed to the office or team via remax.com. There is no monthly maximum for the number of processed leads.

When are concierges active, and when do they respond?

Concierges are on duty 365 days a year, and they respond to leads in as little as 90 seconds – but will not call leads on major holidays including Thanksgiving or Christmas. The calling times are from 8 a.m. to 9 p.m. in the lead's time zone. If a lead comes in after hours, the concierge will call the lead the next day.

Can an agent alter the questions a concierge asks?

Not currently, although work is being done to explore this possibility.

How many touch points does the concierge have with a lead?

Depending on how long it takes to warm up a lead, the concierge can have a minimum of 22 touch points over the period of a year if a lead doesn't opt out. This includes two calls and 20 texts. These are all based on the lead's timeline and behavior. If the team is working with an engaged lead, they may reach out more.

How frequently will the concierge reach out to the lead?

It depends on the lead's timeline. The concierge follows different sequences of outreach based on the timeline the lead has shared. Concierges always respond to any inbound text communications.

What number does the concierge call or text from?

The area code will be in line with wherever the participating affiliate is located.

Will the concierge send emails?

No. The concierge will only call and use text messaging with the lead.

Once a lead is qualified and passed to an agent or team, a member of the Inside Real Estate referral team will communicate via email.

What happens if a lead calls the concierge number?

This rarely happens, but concierges do not answer incoming calls. If the lead requests a call back, the concierge will notify the agent. Otherwise, the concierge will respond via text message.