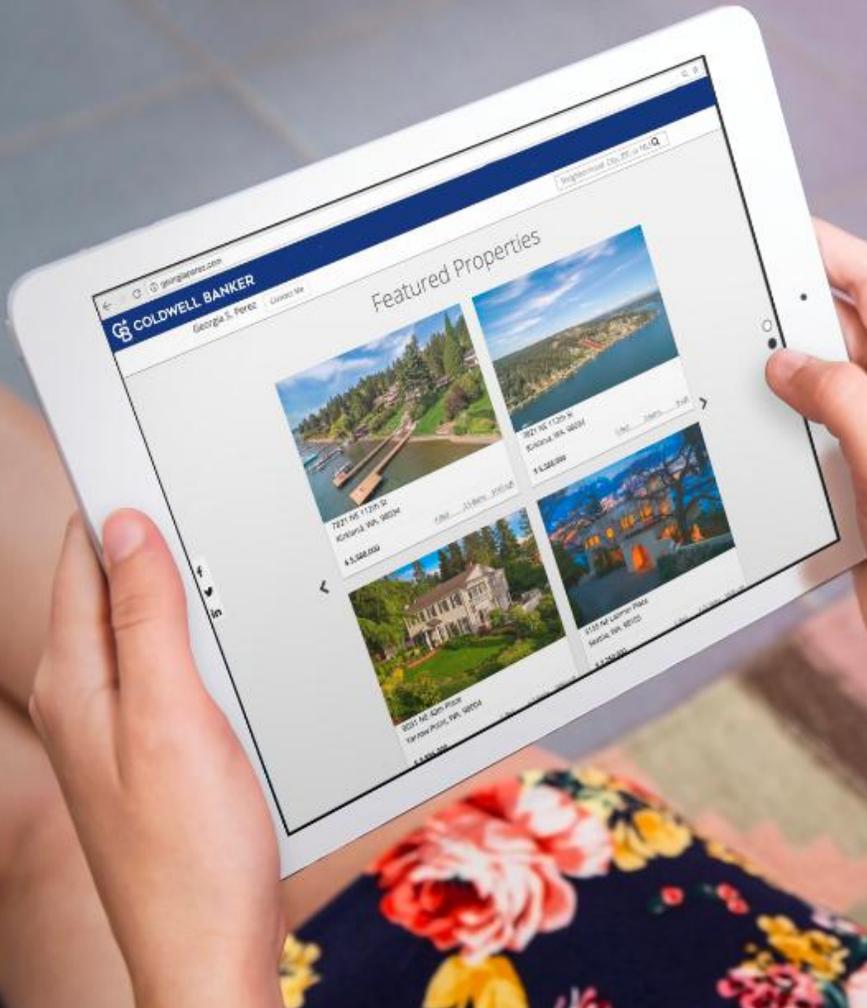




**COLDWELL BANKER**



**MOXIWORKS® ENGAGEMENT GUIDE**  
**FOR AGENTS**



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# WELCOME TO MOXIWORKS®

Dear Coldwell Banker Affiliated Agent,

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.



# GET TO KNOW MOXIWORKS®

## 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 \$11.6K more and were 1.1x more productive<sup>1</sup>. 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.

Agents who used MoxiEngage earned \$22.2K more and were 1.3x more productive<sup>2</sup>. 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.

Agents who used MoxiImpress earned \$48.9K more and were 1.6x more productive<sup>3</sup>. To learn more about MoxiImpress, [click here](#).

1. Based on average commission earned and average units closed of active agents in the Coldwell Banker franchise system with production that performed an action in MoxiPresent® between Jan 1st, 2024 and Dec 31st, 2024. Results are not guaranteed.  
2. Based on average commission earned and average units closed of active agents in the Coldwell Banker franchise system with production that performed an action in MoxiEngage® between Jan 1st, 2024 and Dec 31st, 2024. Results are not guaranteed.  
3. Based on average commission earned and average units closed of active agents in the Coldwell Banker franchise system with production that performed an action in MoxiImpress® between Jan 1st, 2024 and Dec 31st, 2024. Results are not guaranteed.  
© 2026 Coldwell Banker. All Rights Reserved. Coldwell Banker and the Coldwell Banker logos are trademarks of Coldwell Banker Real Estate LLC. The Coldwell Banker® System is comprised of company owned offices which are owned by a subsidiary of Anywhere Advisors LLC and franchised offices which are independently owned and operated. The Coldwell Banker System fully supports the principles of the Fair Housing Act and the Equal Opportunity Act.

# 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.

## PRODUCT TRAINING VIA COLDWELL BANKER UNIVERSITY®

- Specific product training on each product: MoxiPresent®, MoxiImpress®, MoxiEngage®, and MoxiWebsites®. Designed for agents to enhance usage of the specific tool.
- Constant offerings, registration required
- Click here to see [ALL MoxiWorks trainings](#) available on CBU

## FEATURE FOCUS FRIDAY

- In these concise 30-minute sessions, we zoom in on a specific feature, providing you with the knowledge and skills to help maximize your usage of the MoxiWorks tools.
- Held every Friday at noon ET
- Click here to [register for Feature Focus Friday](#)

## MOXIWORKS SUPPORT

Broker & Agent Support Options – Product Related

- [Contacting Support](#)
- Visit the [MoxiWorks Success Portal](#)
- Submit a Moxi [Support Ticket](#)
- [Schedule a call](#) with MoxiWorks Support
- Use the [Chat Support](#) option

The MoxiWorks customer service team is available for chat or calls Monday-Friday, 6am to 5pm PST.

# MoxiWorks Support

Help when you need it

We've partnered with MoxiWorks to better support you. Below are the many ways to get support using the MoxiWorks® product suite. Visit [support.moxiworks.com](https://support.moxiworks.com) to get started.



## Explore the MoxiWorks Success Portal

- [support.moxiworks.com](https://support.moxiworks.com) is the support hub for the MoxiWorks platform
- Enjoy self-service, helpful resources to get questions answered quickly
- Find simple steps, product-specific guides, “hot tips,” FAQs and more
- Also accessible via the “Help” button within each product



## Chat with an Autobot or Start a Live Chat

- Use the “Help” button located in the bottom-right of the Success Portal page (also available on every MoxiWorks product platform)
- If these don't answer your question, you'll be directed to a live chat with a MoxiWorks representative who will be happy to assist you
- Chat autobot is available 24/7; live chat is available M-F from 9am ET to 8pm ET



## Additional Support

- [Schedule a call with MoxiWorks](#)
- [Create a Support Ticket](#)
- [Support Hub](#)

# MAXIMIZE MOXIWORKS® IN THE SALES CYCLE

The real estate sales cycle is a process that many, if not all leads follow as they progress from lead generation all the way through to a post-closing, referral-generating client. Each stage has a number of different activities that are conducted during that period. MoxiWorks can support you at each stage of the sales cycle, creating a dynamic and powerful experience during a transaction.



# YOUR AGENT MOXI PATHWAY TO SUCCESS

- **Ensure your agent MLS Id & Name of MLS are entered in Dash** (your office admin can make this edit).
- **Your online profile/bio.** When is the last time you updated this? Tell your story. Writer's block? Try using AI with [Microsoft Copilot](#) to make it sound awesome. Get with your office admin to make sure your profile/bio is added to Dash.
- **Know the Moxi Support options & USE THEM.** Moxi offers chat & live virtual one on one meetings. [Click here to view the Moxi support options.](#)
- **Learn one Moxi product at a time. Start with MoxiWebsites.** Think of this as your digital billboard offering something of VALUE to the consumer. **Register for LIVE training from our amazing instructors!**
  - ★◦ [Click here to register for live training!](#)
    - MoxiWorks also offers a [recorded webinar MoxiWebsites | Getting Started.](#)
- **And for a Complete Guide to your MoxiWebsite** [check out this step by step Power Point presentation.](#)
- **Next focus on Present.** Impress your potential client, Buyer or Seller with dynamic presentations!
  - ★◦ [Click here to register for live training!](#)
- **Next learn Impress.** You want to be able to repurpose the Impress marketing assets in your MoxiPresent presentations. This is the easiest of products. And when you start Impress make sure to choose your default marketing kit
  - [Here is a Look Book to assist you with this.](#)
- **Next learn Impress.** You want to be able to repurpose the Impress marketing assets in your MoxiPresent presentations. This is the easiest of products. And when you start Impress make sure to choose your default marketing kit
  - ★◦ [Click here to register for live training!.](#)
- **Lastly master Engage.** This is the beast of all Moxi products because it contains several things you can “engage” in:
  - Client Management
    - Subscribe a person or group to Neighborhood News
    - Subscribe a person or group to Listing Alerts
    - Set a person or group to receive a campaign or e-blast
    - Create property searches for contacts Favs & Saves
    - Task lists to keep organized during your transaction
    - Stay on track to reach your GCI goal for the year
  - ★◦ [Click here to select a day/time to take Engage 101.](#)
  - [Click here to select a day/time to take Engage 201.](#)

# MOXIPRESENT®

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.

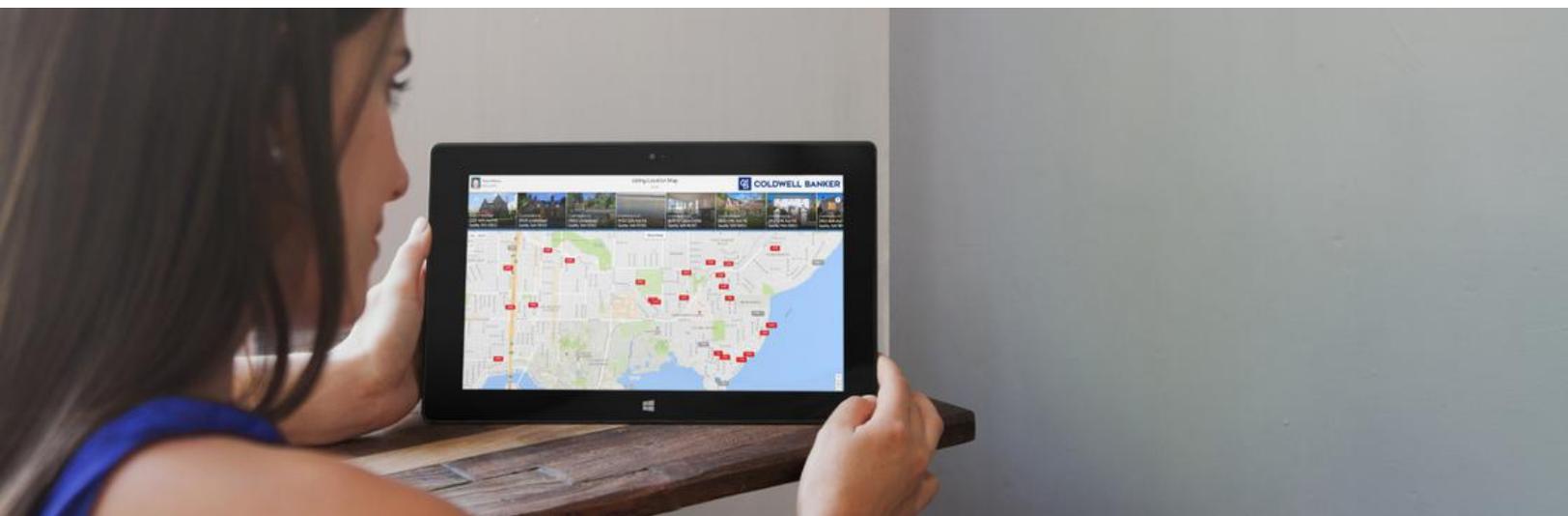
Numerous presentations are available for you. Listing/Seller presentations complete with your CMA, buyer tours, buyers' guides, recruiting presentations or get creative and create your own! Below are the resources to help you engage with this amazing tool!

## MoxiPresent For Agents

- Ongoing Instructor-Led virtual MoxiPresent classes for Agents
  - ★ [Click here](#) to register for live training!
- 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

- [Starting a new presentation](#)
- [Creating and sending a buyer tour](#)
- [Creating a seller presentation](#)
- [Searching for comparables](#)
- [Adding pages from your library](#)
- [Creating a custom page](#)
- [Adding Zillow reviews to a presentation](#)
- [Embedding a Google map](#)
- [Adding video to your presentation](#)
- [Adding iFrame content to a custom page](#)
- [How to create a template](#)
- [Agent Teams: Adding and removing team members](#)



# MOXIIMPRESS®

The Moxilmpress 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:

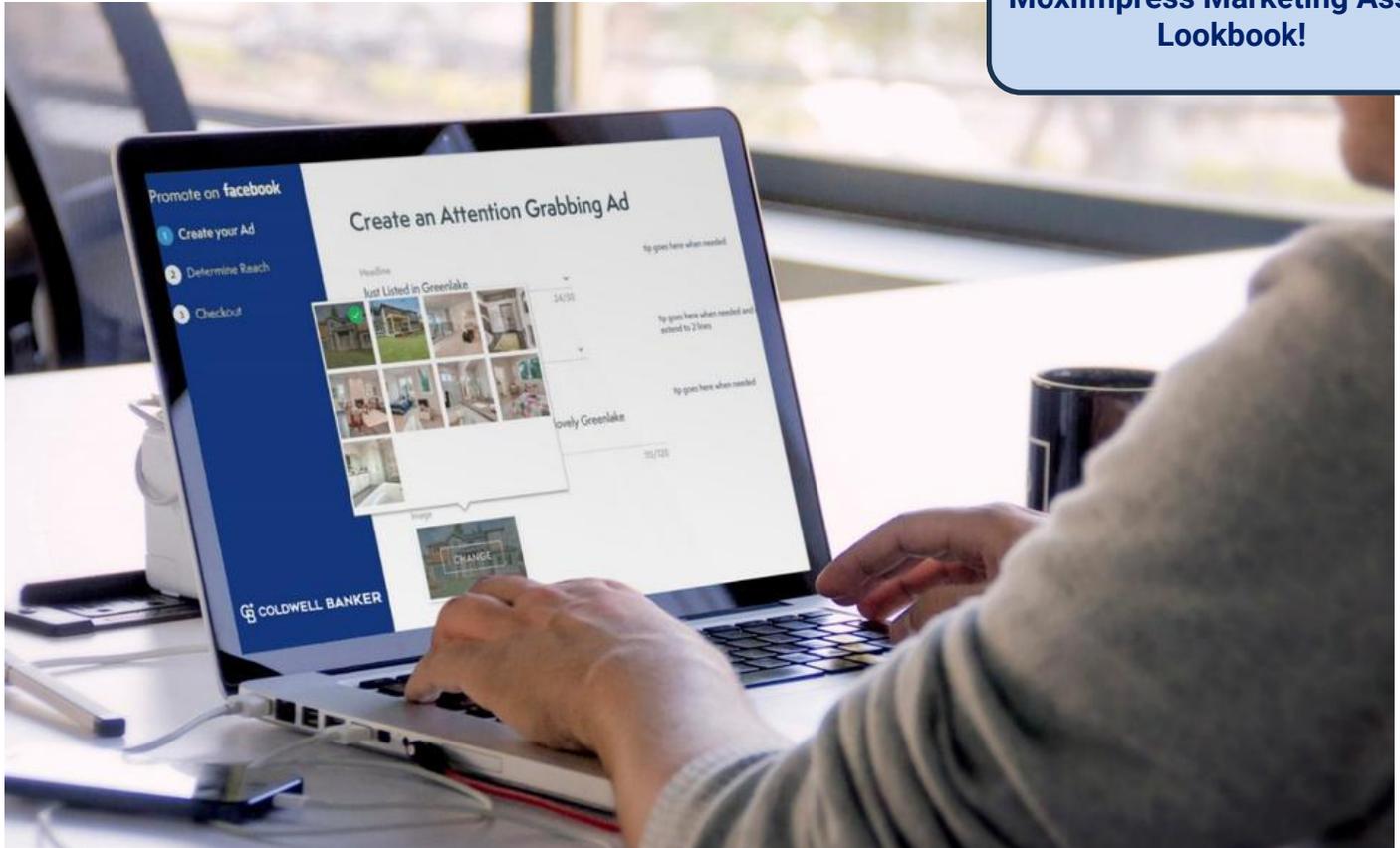
## Moxilmpress For Agents

- Instructor-Led virtual Moxilmpress classes for agents
  - ★ [Click here to register for live training!](#)
- Moxilmpress Success Portal provided by MoxiWorks
  - [Click Here](#) to access the resources.

## Additional Resources

- [Overview and Initial Setup](#)
- [Create multiple projects from one listing](#)

[Click here](#) to view the  
**Moxilmpress Marketing Assets  
Lookbook!**

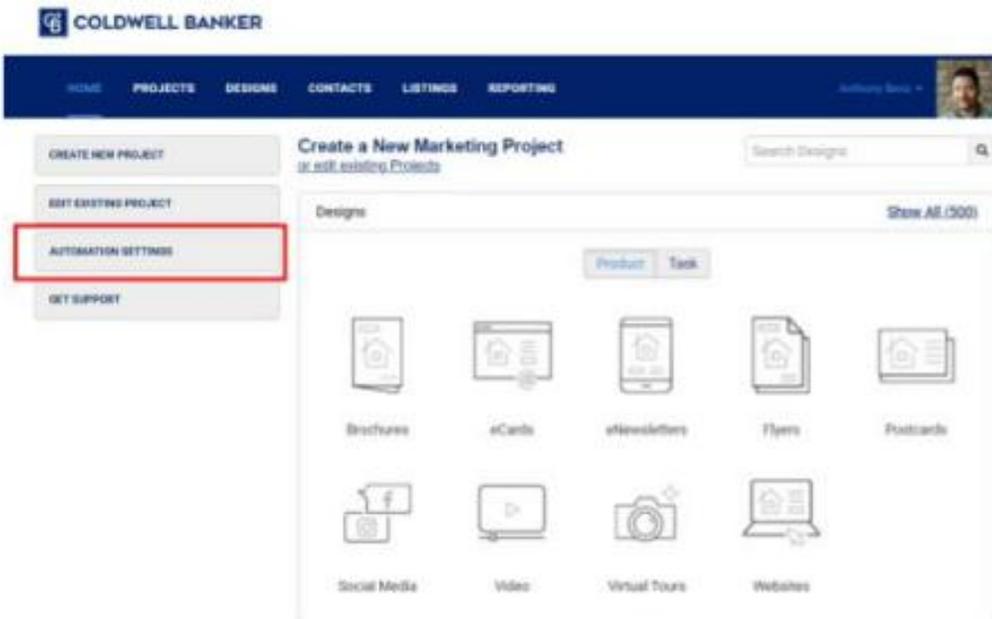


## Choosing your Default Marketing Package for Moxilmpress®

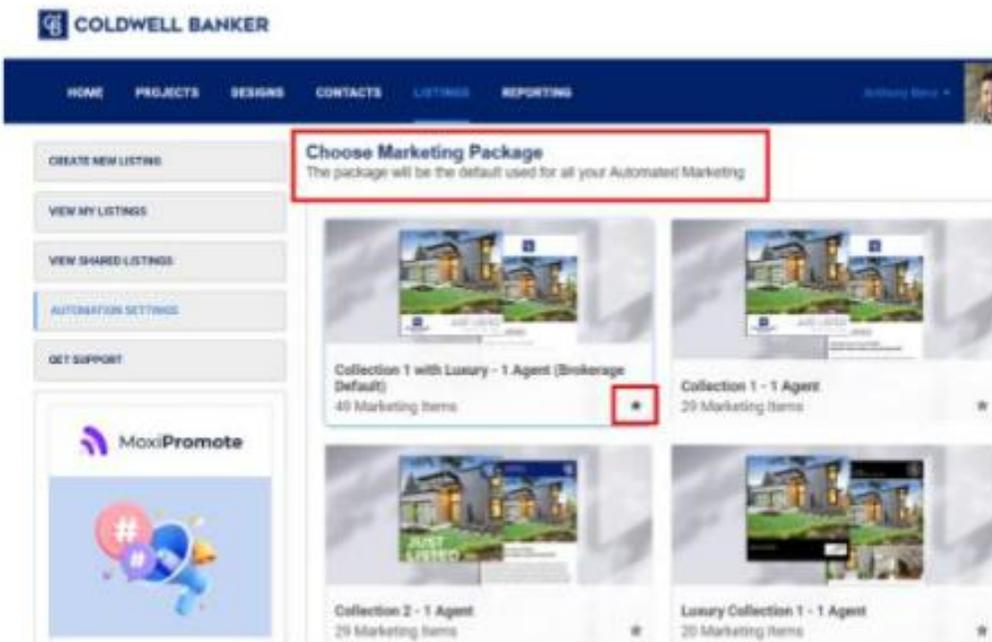
Moxilmpress marketing automation creates a marketing package for your listing and sends you an email. With Agent Choice Automation Settings you select which available marketing package will be created and sent to you.

To select your Marketing Package:

1. From the Moxilmpress home screen, select *Automation Settings*



2. Select the star next to the Marketing Package you wish to use



**Note:** Selecting the thumbnail will open a list displaying all included marketing projects for the selected package. And the new package will not impact any current listings but will apply to the next new listing.

**Example of MoxiImpress email you receive once listing is active on MLS.**

----- Forwarded message -----

From: **Coldwell Banker Seaside Marketing** <[eMarketing@coldwellbanker.com](mailto:eMarketing@coldwellbanker.com)>

Date: Fri, Aug 23, 2024 at 1:34 PM

Subject: Your "Just Listed" marketing package for 405 Wallace Street

To: <[dave@cbseaside.com](mailto:dave@cbseaside.com)>

MoxiWorks

  
**COLDWELL BANKER**

Congratulations, Dave!  
on your listing at 405 Wallace Street  
- courtesy of Coldwell Banker Seaside Realty

Promote your listing and build your brand with three easy steps. In five minutes you'll be on the path to success!

 Social Media Post <a href="#">SHARE ON SOCIAL</a>	 Jumbo Postcard 3 photo - 1 Just Listed - Single Agent <a href="#">PREVIEW</a>
 Paid Social Ad <a href="#">RUN AN AD</a>	



Email - 3 photo Blue header - Just Listed

[PREVIEW](#)



Social Media Post - Blue header no address - Just Listed

[PREVIEW](#)



Just Listed Postcard 5  
Just Listed - Postcard 5

[PREVIEW](#)



Flyer - 5 Photo White header - Just Listed - Single Agent

[PREVIEW](#)



8.5 x 11 Bi- Fold Listing Brochure 2 (Horizontal Fold)

[PREVIEW](#)



Email - 1 photo Blue header - Just Listed

[PREVIEW](#)



Single Property Website

Single Property Website Option 1

[PREVIEW](#)



Virtual Tour option 1

[PREVIEW](#) | [IDX](#)



Branded Video - 10 photo option 2

[Log in to share](#)

There's more you can do in the Marketing Center

[GO TO MARKETING CENTER](#)

### Frequently Asked Questions

[How to create a new project](#)

[How to replace a single image in a project](#)

[How to create multiple projects from one listing](#)

Looking for something else? Explore the [MoxiWorks Help Center](#)

We want to hear about your day-to-day business needs to inform Moxilmpress updates. [Book a Research Video Call](#)

# MOXIENGAGE ®

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 Agents

- Ongoing Instructor-Led virtual MoxiEngage class for agents

★ [Click here](#) to register for live training!

- MoxiEngage Success Portal- [Click Here](#) to access resources

### Additional Resources

- [Email Sync Overview](#)
- [Email Sync- Supported Emails](#)
- [Neighborhood News](#) is the monthly market email drip campaign you can set and forget.
- [Neighborhood News Overview](#)
- [Getting Started: Overview Setup](#)
- [Getting Started: My Contacts](#)
- [Getting Started: Email Campaign Touchpoints](#)
- [Getting Started: Sales Flow Transactions](#)
- [Adding/Importing/Exporting Contacts](#)
- [Managing Contacts](#)
- [Editing a Contact](#)
- [Saved Searches](#)
- [Creating a Property Search For a Contact](#)
- [Subscribe Contacts to Listing Announcements](#)
- [Viewing Your Clients' Favs Property Comments](#)
- [Creating Emails and Campaigns](#)
- [Campaigns & Touchpoints](#)
- [Campaigns](#)
- [Touchpoints](#)
- [Learn More: Sales Flow & Transactions](#)
- [Calendar Tasks & Task Plans](#)
- [GCI Goals](#)

[Click here](#) to view the **Buyer Bundle Lookbook** for assets available in MoxiEngage!



# MOXIENGAGE®

## Move Meter Local Look Campaign

This year's campaign approach centers around city love, with ads featuring head-to-head match ups of some of the most iconic cities in America. Focused on the qualities that make each place unique, the ads encourage viewers to utilize the Coldwell Banker Move Meter tool to dream and compare key selling points between cities, such as cost and quality of living.

Review our [Move Meter 'Local Look' Activation Guide](#) for links to customizable templates and idea starters.

[Click here](#) to view the **Move Meter Campaign Activation Guide** with these MoxiEngage assets

## SINGLE EMAIL TEMPLATES + DRIP CAMPAIGN ON MOXIENGAGE

- 17 individual email templates - one for each Thursday Night Football game airing on Prime Video
- Each email features the weekly Move Meter Local Look video
- Also available as a drip campaign for a set-it-and-forget-it approach
- Each email can be customized to feature a CTA to your personal website, and even your own custom Move Meter Local Look video



# MOXIWEBSITES®

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 Agents

- Ongoing Instructor-Led virtual MoxiWebsites classes for agents

★ [Click here](#) to register for live training!

- MoxiWebsites Success Portal provided by MoxiWorks. [Click Here](#) to access.
- [Click Here](#) for a comprehensive MoxiWebsites Guide for agents

## 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](#) for information on Meta tags
  - [Click Here](#) to learn how to add widgets, plug-ins, or external codes
  - [Click Here](#) to learn more about the Yoast Plugin

## Additional Resources

- [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](#) for a complete walk-thru **guide for MoxiWebsites**

# SUPPORT

## Support on the MoxiWorks® platform

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

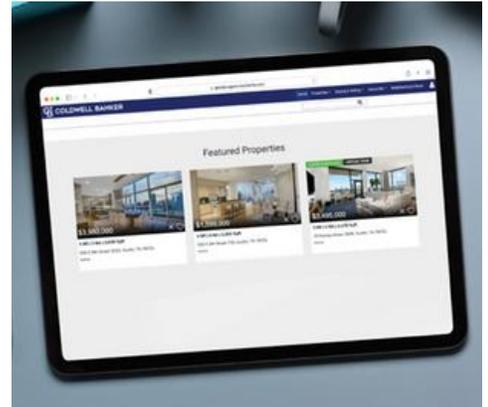
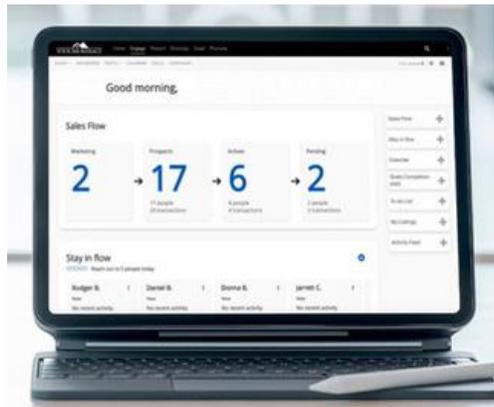
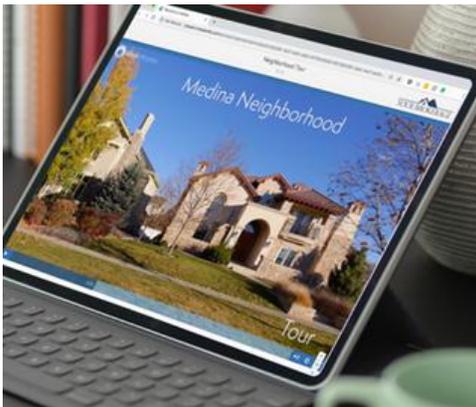
Check out the comprehensive website [Support.MoxiWorks.com](https://support.moxiworks.com)

### Helpful Tips

- [Click Here](#) to use Auto Bot for chat within [Support.Moxiworks.com](https://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
- [Loom Sign-up](#): Sometimes it's easier to explain what you mean through spoken word and a video! You can create a screen recording through an online product such as Loom and attach it or link it as a submission to this ticket. This makes our team's job way easier! It only takes a few minutes to set up, and can save hours in the long run! Plus it's free! (Note that we do not provide support for Loom or other such products).

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

[Click Here](#) to learn about the MoxiWorks Help Center Success Portal



# ADDITIONAL RESOURCES

- [Getting Started with MoxiWorks: Top Things to Know](#)
- [Ultimate MoxiWebsites Guide for Leadership, Staff & Agents](#)
- 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](#) for a complete MoxiWebsite SEO playbook



# FEATURE FOCUS FRIDAY

Are you eager to elevate your skills with the MoxiWorks® platform? Dive deep into the functionalities that matter most to you with the Feature Focus Friday sessions! In these concise 30-minute sessions, we zoom in on a specific feature, providing you with the knowledge and skills to help maximize your usage of the MoxiWorks tools.

## Why Attend?

- **Focused Learning:** Each session concentrates on a specific feature, ensuring in-depth understanding.
- **Practical Application:** Gain hands-on insights for immediate implementation in your real-world scenarios.
- **Time-Efficient:** In just 30 minutes, master a feature and enhance your overall experience with the MoxiWorks tools.

Don't miss the opportunity to amplify your skills with the MoxiWorks tools. Join us every Friday at 9am PT/ 12pm ET for Feature Focus and take your skills to new heights!

[Click here to register](#)



# 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."

**COLDWELL BANKER TRADITIONS  
WILLIAMSBURG VA**

"Moxipresent has Such amazing flexibility and user friendly! Makes my life much easier."

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

"Very hands on and empowering platform!"

**COLDWELL BANKER REALTY  
NORTHERN CALIFORNIA**

"Moxiworks basically does everything for me!"

**COLDWELL BANKER REALTY  
UTAH**

"MoxiPresent is one of the best products out there...period!"

**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!"

**COLDWELL BANKER REALTY  
UTAH**

"User friendly and helpful with setting up blogs and so much more!"

**COLDWELL BANKER PROFESSIONALS  
MICHIGAN**



**COLDWELL BANKER**



FEBRUARY 2026  
PROFESSIONAL  
DEVELOPMENT  
CLASS SCHEDULE

Coldwell Banker University® | [CBU.com](http://CBU.com)

All classes are subject to change. To view the most up to date schedule visit **Events Calendar at CBU.com**

FEB 02

[Coldwell Banker® Orientation | 4:00 PM \(ET\)](#)

FEB 04

[Lead Gen: SOI | 11:00 AM \(ET\)](#)

FEB 05

[Outlist Outlast- Part 1 of 4 | 11:00 AM \(ET\)](#)

FEB 09

[Pricing Strategies for Every Market- Part 1 of 3 | 11:00 AM \(ET\)](#)

[Getting Started with AI | 2:00 PM \(ET\)](#)

FEB 10

[BootcAMP - Part 1 of 4 | 4:00 PM \(ET\)](#)

FEB 11

[Prompt Like a Pro | 2:00 PM \(ET\)](#)

FEB 12

[Outlist Outlast- Part 2 of 4 | 11:00 AM \(ET\)](#)

[Business Planning | 1:00 PM \(ET\)](#)

[BootcAMP - Part 2 of 4 | 4:00 PM \(ET\)](#)

FEB 13

[Owning Your Value | 1:00 PM \(ET\)](#)

[Build Your AI Stack | 2:00 PM \(ET\)](#)

FEB 16

[Coldwell Banker® Orientation | 4:00 PM \(ET\)](#)

FEB 17

[Open Houses: Servicing the Seller | 10:00 AM \(ET\)](#)

[AI Prompting Lab | 2:00 PM \(ET\)](#)

[BootcAMP - Part 3 of 4 | 4:00 PM \(ET\)](#)

FEB 19

[Outlist Outlast- Part 3 of 4 | 11:00 AM \(ET\)](#)

[Pricing Strategies for Every Market- Part 2 of 3 | 11:00 AM \(ET\)](#)

[Agents Helping Agents | 2:00 PM \(ET\)](#)

[Converting with Confidence | 2:00 PM \(ET\)](#)

[BootcAMP - Part 4 of 4 | 4:00 PM \(ET\)](#)

FEB 23

[Pricing Strategies- Part 3 of 3 | 11:00 AM \(ET\)](#)

FEB 12

[Outlist Outlast- Part 4 of 4 | 11:00 AM \(ET\)](#)

EVERY THIRD THURSDAY AT 2:00 PM (ET)

# Agents Helping Agents

RECORDED SESSIONS AVAILABLE AT CBU.COM > AGENTS HELPING AGENTS

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## Agents Helping Agents

A monthly live virtual panel connecting top real estate professionals across the Coldwell Banker network, offering actionable insights, proven strategies, and success stories to help agents refine their practices and elevate their businesses.

## AI Prompting Lab

This optional learning session will help you master AI prompting to help you take your business to the next level. You'll explore the CRIT formula, an established framework for generating better, more relevant responses from AI tools tailored to your business needs. Each AI Prompting Lab will focus on a specific topic. Whether it's attracting new leads, nurturing existing ones, or delivering exceptional client service, you can apply AI effectively across multiple stages of your business.

## Boot Camp

BootcAMP is an introductory program designed to welcome new to the business agents to real estate. Participants focus on key business terms, concepts, and habits. Using a combination of activities, discussion questions, and real-world scenarios, participants lay a strong foundation for a successful business and prepare for AMP.

## Build Your Own AI Stack

In this workshop, you'll start to build your personal "A.I. Dream Team" by matching tools to the tasks that matter most in your business. You'll see three powerful tools—Perplexity, Claude, and Canva—in action and learn how to use them for research, practice, and marketing. By the end, you'll know exactly which tools belong in your own A.I. stack and how to put them to work right away to save time, scale smarter, and stay ahead of the competition.

## Business Planning

Designed to help real estate professionals take control of their financial future by creating a clear, actionable roadmap for success. Using the Coldwell Banker Business Planner, agents will learn how to set realistic 1, 3, and 5-year financial goals, analyze key business metrics, and identify the most efficient path to growth.

## Coldwell Banker® Orientation

In this optional learning session, discover what sets Coldwell Banker® apart from other real estate companies, including the exclusive tools, systems, and resources available to you to grow your business... This is only the beginning!

## Create a Scroll Stopping Video Script

Today's buyers and sellers spend hours scrolling—but only the most engaging videos make them stop and watch. In this workshop, you'll learn how to turn any property into a story that captivates and converts. Using a simple, repeatable prompt, you'll create a 60-second social media video script designed to grab attention, highlight what makes the home special, and strengthen your personal identity. You'll leave with a ready-to-shoot script that hooks viewers, drives engagement, and positions you as a modern, marketing-savvy agent.

## Create a Customized Seller Conversion Plan

Some listing appointments end with a seller saying, "We need to think about it." That happens when the presentation feels generic instead of personal. In this workshop, you'll learn how to turn prequal answers into a customized listing appointment plan that connects directly to each seller's motivations, priorities, and concerns. You'll leave with a ready-to-use Seller Conversion Plan that anticipates objections, aligns your value with what matters most that can help you obtain a signed agreement instead of a stalled decision.

## Create a Seller Email Campaign

Some homeowners aren't planning to sell—until the right opportunity makes them pause. In this workshop, you'll build a neighborhood-specific email campaign that sparks interest and highlights your in-depth local insight. You'll leave with a ready-to-send multi-email campaign plus a reusable prompt you can apply any time you have motivated buyers.

## Converting with Confidence

The number of people who will buy or sell property in your market is finite, and if you don't have systems in place to get their business, another agent will. Discover strategies and techniques that can help you win the race to face-to-face and get the business with Converting with Confidence. Facilitator-led optional sessions and a participant workbook can help you evaluate and prioritize your lead sources, explore how to group leads by urgency and trust, create follow up plans based on urgency, and modify example scripts to get the appointment.

## Getting Started with AI

AI is giving your competitors 5-10 extra hours every week while you're still writing listing descriptions by hand. This dynamic 30-minute session shows how AI tools like Microsoft Copilot can transform your real estate business from time-consuming to time-optimized. You'll see live demonstrations of AI creating listing descriptions and follow-up emails in seconds, learn practical prompting strategies, and discover the four-stage evolution from AI beginner to strategic partner. Walk away with a commitment to give three specific tasks to AI this week and reclaim hours for high-value client activities.

## Lead Generation

The Lead Generation Series empowers real estate agents with proven strategies to generate and convert leads through Expireds, Farming, and Sphere of Influence. This series provides actionable techniques to capitalize on expired listings, establish and grow a farm area, and systematically engage with a sphere of influence? helping agents build a sustainable pipeline of business.

### Owning Objections

Learn how to confidently navigate objections from buyers and sellers. This course provides agents with the tools, strategies, and practice needed to respond effectively to common objections. Gain the skills to reframe challenges, build confidence, and turn objections into opportunities for success.

### Owning Your Value

This course guides agents through the process of identifying what sets them apart, effectively communicating those unique strengths to buyers and sellers, and providing proof of success. Agents will take a deep dive into their value, learning techniques to help articulate and demonstrate it confidently in any situation.

### Pricing Strategies for Every Market

A three-part course designed to help agents master market analysis, create accurate Comparative Market Analyses (CMAs), and confidently guide sellers to the right price.

### Pricing Repositioning In Today's Market

Are you experiencing price reductions in your market? Get ahead of it by exploring tactics for navigating the market repositioning conversation with your current sellers and leveraging market data to set expectations from the start in your Listing Presentation.

Price Positioning in Today's Market covers tactics and tools that can help you manage seller expectations during and after the Listing Presentation. In this optional course, apply your skills to common scenarios and practice sample scripts to help master the positioning conversation and handle the objections of today's sellers.

### Prompt Like a Pro

In this fast-paced session, you'll learn how to transform AI from a generic content generator into your personal marketing assistant. You'll discover the CRIT Formula—a simple, repeatable framework that turns scattered thoughts into polished newsletters, blog posts, and social media content that sounds authentically like you. Whether you're creating market updates, property descriptions, or engagement posts, you'll learn how to partner with AI strategically—not just use it randomly. You'll leave with clear formulas, live demonstrations, and a content multiplication strategy you can use immediately.

### Winning with Buyers 201: 5 Steps to Buyer Consultations that Convert

Explore best practices for conducting the 5 steps of a Buyer Consultation to demonstrate your professionalism and help you close with a signed Buyer Representation Agreement. Collaborate with fellow agents to craft sample scripts and apply Buyer Consultation skills to case studies.

All classes are subject to change. To view the most up to date schedule visit [Events Calendar at CBU.com](https://www.cbu.com/events)

FEB 06

[Feature Focus Friday | 12:00 PM \(ET\)](#)

FEB 25

[Moxilmpress® | 1:00 PM \(ET\)](#)

FEB 13

[Feature Focus Friday | 12:00 PM \(ET\)](#)

FEB 27

[Feature Focus Friday | 12:00 PM \(ET\)](#)

FEB 18

[Action Lab: Activating Your CB Agent Website | 1:00 PM \(ET\)](#)

FEB 20

[Feature Focus Friday | 12:00 PM \(ET\)](#)



**FEATURE  
FOCUS  
FRIDAY**



**EVERY FRIDAY @ 12:00 PM (ET)**  
CBU.COM > PRODUCTS & PROGRAMS > FEATURE FOCUS FRIDAY

### Action Lab: Activating Your CB Agent Website

Are you ready to unleash the power of the MoxiWebsites® tool? Join us for a hands-on virtual workshop, Action Lab: Activating Your Agent Website where we will dive into the power of this exciting tool. This course will walk you through the steps to activate your agent website using the MoxiWebsites tool. The agenda includes dedicated time for you to try out each feature and activity with the instructor there to answer your questions and provide guidance. You will walk away with actionable insights and practical skills you can implement immediately.

### Feature Focus Friday

Are you eager to elevate your skills with the MoxiWorks® platform? Dive deep into the functionalities that matter most to you with the Feature Focus Friday sessions! In these concise 30-minute sessions, we zoom in on a specific feature, providing you with the knowledge and skills to help maximize your usage of the MoxiWorks® tools.

### MoxiEngage® 101: Maximize Your SOI

MoxiEngage 101 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.

### MoxiEngage® 201: Email Marketing

MoxiEngage 201 is the second course in the MoxiEngage series. 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".

### MoxiImpress®

MoxiImpress is a powerful marketing platform that uses automation to instantly create a comprehensive marketing package for listings. This 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 agents and employees alike.

### MoxiPresent® 101: Getting Started

MoxiPresent 101 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 a Listing Presentation with embedded CMA and learn how to share presentations through multiple channels.

### MoxiPresent® 201: Customizing Presentations

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.

### MoxiWebsites® 101: Setting Up Your Website

MoxiWebsites 101 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.

### MoxiWebsites® 201

MoxiWebsites 201 is 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.

### MoxiWorks® Throughout The Sales Cycle

MoxiWorks Toolkit for Agents 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.



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