



PEMBERTON HOMES SINCE '78



GUIDELINES

OVERVIEW

- Buyer calls Zillow because they want to see a home.
- Agent or ISA answers the call and sets an appointment.
- Referral fees apply (*subject to change, check link for current: <https://www.zillow.com/premier-agent/flex-pricing/>)

Minneapolis/St. Paul/Bloomington

Transaction Price	Zillow referral fee (% of the commission)
\$275,000.00+	35%
\$175,000.00 - \$274,999.99	30%
\$100,000.00 - \$174,999.99	25%
\$0 - \$99,999.99	20%

JOINING THE PHT/ZF TEAM

- Create and build your Zillow Profile.
 - zillow.com/premier-agent/agent-account
- Accept invitation to join PHT/ZF team.
 - If you do NOT receive an email: Go to Premier Agent Profile, then upper right profile drop down > Settings. When new page opens, go to far left and select Management > Team. Invitation should appear. Click the check mark.
- Complete online ZF agreement.
 - zillow.com/pbflex/agent

RECEIVING ZF LEADS

- PHT agents receive ZF leads in two different ways: direct calls and ISA handoffs. ZF calls are distributed to agents based on geographical lead regions. During onboarding, agents select the lead regions in which they would like to take calls.

DIRECT CALLS

- Agents will be added to the Slack channel called zillow-flex-opt-in.
- Each day at 4:00pm, there will be a post in that channel directing agents to reply "in" if they would like to receive ZF leads the following day.
- Replies can be made any time until 8:00am the following morning (replies on Thursday afternoons will apply to Friday, Saturday, and Sunday). Be sure to "reply in thread."

ISA HANDOFFS

- Agents will be added to Slack channels for whichever lead regions they selected. When an ISA sets an appointment, they will post the details in the Slack channel. Agents can claim the appointment by replying with the word "me" in the thread.
- Agents should not take more than 2 ISA appointment handoffs per day.
- The ISA will send a 3-way text to the lead and the agent using the agent's FUB phone number.

Thread # zillow-flex-opt-in



Zapier APP Today at 4:01 PM

Reply in thread "IN" if you'd like to receive Zillow calls for the following day or weekend.

10 replies



Mike Dicks 1 hour ago

In



Joshua Anschutz 1 hour ago

In

Thread west-region-leads



Naomi Moturi Nov 22nd at 6:18 PM

Saint Louis Park - Friday at 10am

1 reply



Angela Kim 1 day ago

Me





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GUIDELINES

ANSWERING A ZF CALL

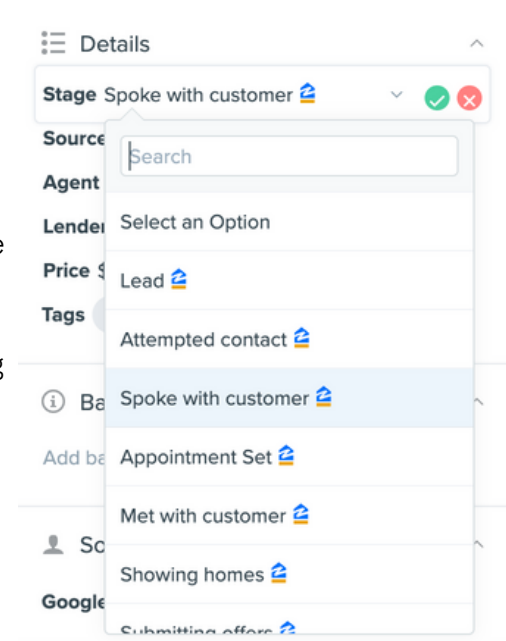
- Introduce yourself.
- Go through ALM (appointment, location, motivation) – see "ALM Lead Sheet." Zillow records and analyzes these calls and assigns a score based on whether each of the three elements are discussed.
- No need to ask about financing preapproval.

AFTER THE CALL/ISA HANDOFF

- The lead will be assigned to you in ZF/FUB. All communications with the lead should be made through FUB.
- Text the lead a video through FUB once you have confirmation of the showing.
 - This humanizes the transaction and significantly raises the chances a lead will meet you (not no-show).
 - SCRIPT: Hey, it's (name). I'm happy to report I have us all set for (address) at (time). I drive a (car color and type – NOT BRAND) and will be waiting for you out front a few minutes early. This is my cell phone number, please feel free to call or text if you need anything on your end prior.
- Set up a property search and send to their email.
- Prepare a home buyer folder with information about the property, team, and yourself to give to them at the showing.

PIPELINE MANAGEMENT

- Zillow Flex and Follow Up Boss have a two-way integration, so anything recorded in one platform will be copied to the other. We ask agents to make all updates in FUB.
- Update ZF leads daily in FUB, including status and notes.
- Active Statuses
 - Always move down through the progression of statuses, not up
 - Met with customer: Use this status if you met with the lead, whether it was in person or over Zoom/Facetime
 - Showing Homes: Use this status once you have shown the lead at least one home, even if they need to pause for a bit.
 - Submitting Offers: Use this status once you have submitted at least one offer for the lead
 - Under Contract: Use this status once the lead has a signed purchase agreement. If the PA cancels, status can be changed back to Submitting Offers.
- Other Statuses
 - Nurture: Lead plans to buy, but not for 90+ days
 - Leave note in ZF with information on timing and circumstances (ex: buyer wants to move at the end of the school year). ISAs may add drip campaign.
 - Rejected: Lead already has an agent, already bought a home, or is unresponsive (ONLY AFTER following protocol below for unresponsive leads)
 - Agent must leave note in FUB describing why lead was rejected (NOT just answering the survey question that pops up when status is changed)



GUIDELINES

UNRESPONSIVE LEAD PROTOCOL

- Day 1: Call lead and don't leave a message. Call again right away and leave a voicemail. Send a video text.
- Day 2: Call lead and don't leave a message; call again right away and leave a voicemail. Send a text.
- Day 3: Call and text.

STANDARDS

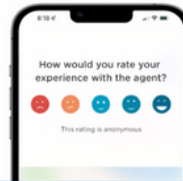
- Zillow goals
 - ALM Score: 80%
 - Appt Set: 70%
 - Met With: 50%
 - Showing: 45%
 - Offer Rate: 20%
 - Conversion Rate: 10%

ZILLOW CUSTOMER RATINGS

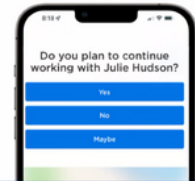
- Zillow sends survey to leads on Day 1, Day 2, and Day 45
- Customer satisfaction score (CSAT) goal: 90
- Work with rate (WWR) goal: 35%
- Sample Script (end of first call): My partners at Zillow will be sending you over a survey or two. If you felt my team and I have been helpful, we would appreciate you choosing the biggest smiley face and confirming that you are planning to continue working with us.

Customer experience: CSAT and "Work with" rate

Customer experience is designed to recognize agents who play a vital role in their clients home search, act as a trusted guide, and commit to delivering exceptional experiences.



Customer satisfaction score (CSAT)
This question allows the home buyer to rate their experience speaking to and/or working with you.



"Work with" rate
This question allows the home buyer to confirm if they plan to continue working with you after the initial conversation.

CLOSING

- Zillow will send out notifications about transaction details and payments. PHT staff handle these, so agents can delete. PHT staff will also change status to Sale Closed.
- Zillow leads continue to require a referral fee for 2 years.

APPOINTMENT

Agent: Hi! This is _____, Realtor and Zillow partner in (city). When would you like me to set up your showing at (address)?

Agent: Awesome! Let me contact the sellers and get that approved for us. Is it okay if I text you at this number once I get confirmation? Would you like me to send you a calendar invite with the details as well?

Agent: Great! Thank you! (Move on to next question without space.)

LOCATION

Agent: In the meantime, while we're out would you like me to schedule any other homes to see?

Agent: Perfect, no problem. **OR** **Agent:** If I see anything off market, I'll text it to you, as well. Okay?

Agent: Great!

MOTIVATION

Agent: I'd love to ask, what interested you about this property?

Agent: That's awesome, I love that, too. (Mirror their feedback.)

(Ask specific questions and listen- follow 70/30 rule, with 70% of your time listening, 30% talking)

Take specific notes and add them to FUB. Set lead up on an MLS property search.

AGENT SCREENING

Agent: Are you just getting started with your search or have you been looking for a while?

Answer 1: Yeah, we're just getting started.

Agent: Perfect, I only ask because I don't want to step on any Realtor relationships if you had one. (Pause)

OR

Answer 2: We've been looking for a while.

Agent: Nice! Have you been looking with an agent or just window shopping online and at open houses?

If they have an agent relationship, ask if they are open to interview you, too, as agents operate and perform drastically different from market to market.

If they are fully committed to an agent, simply let them know you respect the relationship and would recommend having that agent set up the showing. Wish them a nice day and move on to the next one.