



PEMBERTON
HOMES SINCE '78



GUIDELINES

OVERVIEW

- Buyer calls Zillow because they want to see a home
- Agents 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

ANSWERING A ZF CALL

- Introduce yourself
- Go through ALM (appointment, location, motivation) – see "ALM Lead Sheet"
- No need to ask about prequalification for financing

AFTER THE CALL

- Send them a video once you have confirmation of the showing.
 - This humanizes the transaction and significantly raises their obligation to meet you (not no-show).
 - SCRIPT: Hey, it's (name). We chatted a few minutes ago and 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.
- Make all notes from call in CRM/ZF dashboard.
- 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.



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PIPELINE MANAGEMENT

- Update daily, including status and notes
- To see your leads, go to Zillow Premier Agent > Contacts
- Recent Activity shows you homes viewed recently

Contacts

Filters Search contacts Export CSV Add contact

218 contacts need attention. You can add a note or update status. [View contacts.](#)

FLEX ALL CONTACTS

| Contact | Recent Activity | Last communication | Created | Assigned to | Contact status | Latest note |
|---|-------------------------|-------------------------|---------|-----------------|-------------------|---|
| Sarah m: (507) 401-1576 bblbler81@hotmail.com Buyer • Trulia Update Due | Mar 11 View activity | Mar 09 View activity | Mar 09 | Kasandra Rinnet | Appointment set | Appointment set with bblbler81 on March 12 More/Add a note |
| Blanche M Fiebing m: (706) 580-4129 blanchefiebing@gmail.com Buyer • Zillow Update Due | Feb 25 View activity | Feb 25 View activity | Feb 25 | Kasandra Rinnet | Spoke with custor | Blanche is currently working on getting pre... More/Add a note |

melissa scheel
Buyer

Appointment set
m: (651) 324-6492
melissascheel93@gmail.com
From Zillow

Insights Edit

- Pre-approved?
- Has a lender?
- Has an agent?
- Timeframe to move?

Notes

Write a note

Appointment set with melissa scheel on Mar 21 at 5:30 PM

Melissa is just getting started with her home search.

ISA handoff Naomi.
Added by Naomi Moturi on Mar 21, 2022 at 8:22 AM
Edit Delete

Confirm you're melissa's agent

You'll be melissa's agent on Zillow until 09/17/22. To extend the date, ask melissa to confirm that you're still working together.
Learn more
Confirm

Activity
Last 7 days

- 8 Homes viewed
- 3 Homes saved

- 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.

melissa scheel
Buyer

Appointment set

- New
- Attempted contact
- Spoke with customer
- Appointment set
- Met with customer
- Showing homes
- Submitting offers
- Under contract
- Sale closed
- Nurture
- Rejected



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GUIDELINES

- 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 describing why lead was rejected (NOT just answering the survey question that pops up when status is changed)

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

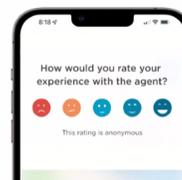
- Zillow goals
 - Appt Set: 70%
 - Met With: 50%
 - Offer Rate: 20%
 - Conversion Rate: 10%

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 TCs/Controller handle these, so agents can delete. PHT TCs/Controller 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 caught your eye about this property?

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

(Ask specific questions and don't over talk- 70/30 rule)

Take specific notes and add it to their notes, and set 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 yourself, 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.