
Zillow PREMIER AGENT
Conversion Playbook

How we built this playbook

If you want to be the best, you learn from the best.

When we set out to develop this guide, we started with the top-producing teams working with customers from Zillow. We've conducted in-depth interviews with more than 50 elite real estate businesses across the country — meeting their teams, diving deep into their sales process, listening to their interactions with clients — to uncover proven best practices for conversion.

We've distilled our findings into this playbook, and we're excited to share some of the good stuff with you.





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Principles

The principles of this playbook are rooted in what we and top industry professionals have observed over years in the business of real estate. These principles are core to Zillow Group, and they should be a core part of how you structure your day-to-day operations as well.



Principles

Customer first

We believe that success in real estate comes from putting the customer's experience first. The bar is rising on customer experience every day, and it's our position that anyone who compromises on this front will be left behind.

Reach for the sky

Everyone wants to do better and achieve more — customers, agents, teams and Zillow Group. The best way to make sure our dreams come true is to articulate them as goals, determine what we need to achieve them and then execute that plan.



Turn on the lights

Numbers light the way to achieving our goals. Robust reporting — and a commitment to leveraging the insights it reveals — is essential to evaluating the performance of teams and identifying opportunities for improvement.

Specialize to strengths

Home buying is complicated, and we believe it's best handled by specialists. If you were running a restaurant, you wouldn't expect your bartender to prepare entrees or your chef to mix cocktails. But when they work together focusing on their specialized tasks, guests have a great experience. In the same way, you need the right people working in the right roles for your team.



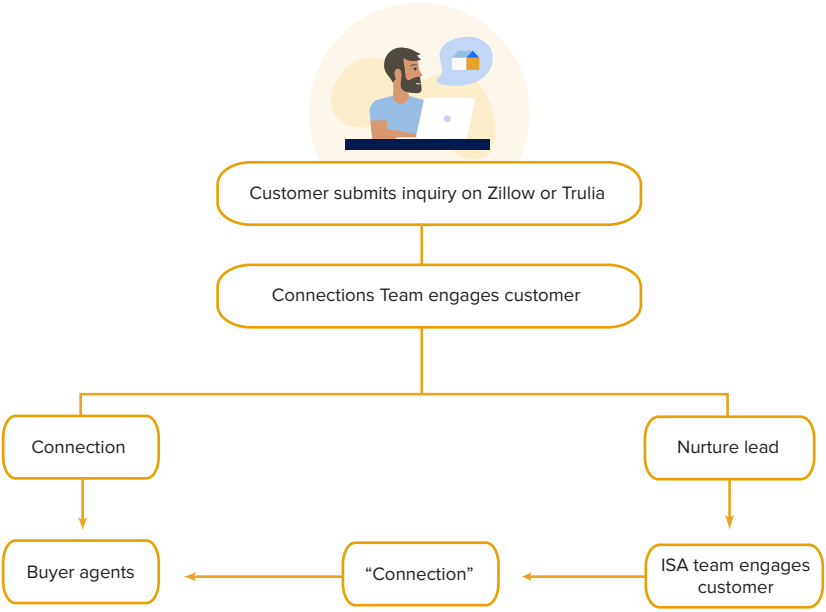


Sales process

A successful real estate team depends on a sound, documented sales process to act as a blueprint for converting any buyer. This section details the process for converting what we call “active customers” into clients, ultimately resulting in transactions. It also describes the process for turning “inactive customers” into active customers when they are delivered as nurture leads, or when they are delivered as connections but then go cold.

Active customers

Setting your team up for successful connection calls



One of the keys to successful conversion of active customers is the right **division of labor.** Top teams divide labor this way:

1 Connections are routed directly to buyer agents

To reduce friction in the customer experience, route connection calls directly to the buyer agents with whom they would be working. This helps to build rapport between agents and their clients, and gives customers one main point of contact for their home-buying journey. For this reason, connection calls should not be routed to ISAs (inside sales agents).

2 Connections are routed with Zillow Premier Agent's lead routing

Use routing rules in the Zillow Premier Agent app to ensure each connection goes to the agent who works the appropriate ZIP and price point. Using Zillow Premier Agent routing rules also avoids the technical challenges associated with third-party routing systems.

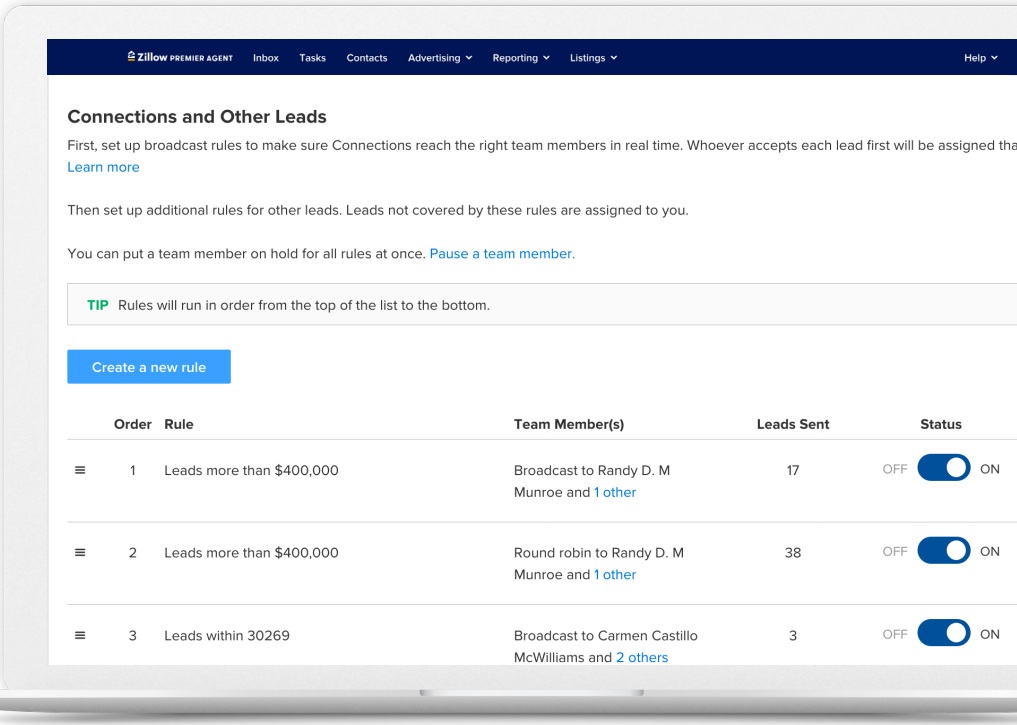
A TIP FOR TEAMS

Team leaders should actively manage each agent's capacity using the pause functionality in Zillow Premier Agent routing rules. This way, you stop sending connections to agents who have already received the maximum number they can convert in a given time period.

3 Buyer agents get leverage from support staff

To free up buyer agent time to take connection calls, each agent should have access to support staff to help them stay efficient. Key support roles include showing agents, transaction coordinators, and assistants. In particular, showing agents are a key leverage point that we strongly recommend.

Example of Zillow Premier Agent **routing rules** using price point and ZIP codes





Best practices for connection calls

An active customer has almost always done some research before reaching out to an agent via a connection call. There are a number of common obstacles that agents face on this call: For example, the customer may think you are the listing agent. Maybe the home they inquired about is under contract or has already sold. Or, perhaps, the customer has ultra-specific questions about the upstairs bathroom. **Active customers will likely know more about the home they are inquiring about than you do** — but that's OK.

Instead of focusing on the property, shift the focus of your connection calls to the person and what they need in a home. This will position you to build rapport and credibility with the customer.

A successful connection call has one objective: **to get face-to-face with the person on the other end of the phone.**

Follow the **ALM** framework for structuring all connection calls around this objective:

A

Appointment

Whether the lead came in as a standard connection, as a tour request or as a nurture lead, the most important question to ask is, “When do you want to see the home?” If the home is unavailable, ask when they would like to see other similar homes. This question should come as soon as possible in the conversation.

L

Location

Immediately after setting a time to see the home the customer has inquired about, you should ask what other homes they’re interested in seeing. You should strive to always show more than one property to the customer per appointment. If they haven’t identified any other homes they’d like to see, ask whether you can take the liberty of finding similar homes to add to the itinerary.

M

Motivation

The secondary objective for the call is to learn more about the customer so that you can serve them better and build rapport. The immediate justification for asking questions about their motivation is to identify other properties to tour on the same trip. We recommend asking the following questions about the person and their search:

- What interests you about this property?
- How long have you been looking?
- Have you seen any other properties?



Topics to avoid on connection calls

Where possible, you should avoid discussing any of the following topics on the initial connection call:

Whether the customer is working with an agent

On the call, seek to demonstrate value to the customer. Try to make a positive impression so that if they're ever considering a change, they keep you in mind. If you are unsure whether the customer is represented, the best practice is to ask at the first showing, "Has anyone else been showing you homes?"

Financing questions such as mortgage pre-approval

This is a sensitive topic that's best tackled in person through related general questions like "What do you do for a living?" and, if necessary, more specific questions like, "Are you thinking you'd be financing this purchase or paying cash?"



How buyer agency works

The focus of the call should be the topics that interest the customer: their immediate home search goals and the concrete things you'll do to help achieve them. Avoid bringing up the topic of buyer agency.

Setting up a buyer consultation prior to seeing the property

A buyer consultation shouldn't be a hurdle customers have to jump over to get started seeing homes in person. Demonstrate the value of your services over the course of a few showings, and then offer to sit down to discuss a formal working relationship when it seems appropriate. That said, for safety reasons it's perfectly appropriate to meet the customer at a public place before proceeding to the first showing.

Other detailed questions the customer has about the property

Where possible, focus on gathering the customer's questions rather than answering them live, and assure them that you'll have all of the answers to their questions at the time of the showing. Of course, there are some who will want answers live on the phone, in which case you should feel empowered to pull up the property on Zillow and the MLS.

Following up after the call

Your chances of a successful showing appointment with the customer increase greatly when you follow up after the call. This practice communicates your organization and eagerness to work together — both qualities that customers value. We recommend following up:

Within two business hours by text and email confirming the time and date of the showing. Provide a list of properties to be shown if applicable.

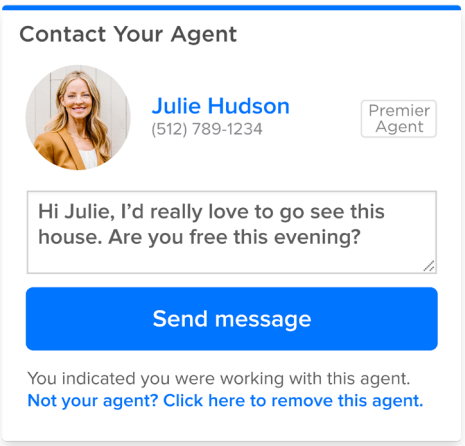
Again by text a few hours before the appointment, if the showing is scheduled for a time more than 24 hours after the initial follow-up.

A TIP FOR TEAMS

After the showing, it's helpful to have an ISA place a courtesy call to the customer to confirm that the showing took place and to gauge the customer's satisfaction with the agent. The ISA should be empowered to introduce the customer to a different agent if they would prefer to work with someone else.

My Agent keeps you connected

Once you've successfully completed the connection call, a My Agent relationship is created between you and the customer. This feature keeps you top of mind while the customer looks at properties on Zillow and includes your contact information on saved search emails, allowing them to easily contact you about a home they're interested in seeing.





Tour connection best practices

Tour connections are a little different from phone connections, but the principles behind converting them into clients are the same. Your goal is to secure a face-to-face appointment that positions you as the agent they want to continue working with. You also need to ensure you're delivering a great customer experience by quickly following up to let them know if the tour request can be fulfilled at the desired time. The acronym **TOUR** can help guide you in meeting these objectives.

T

Take a moment to check your schedule

When a new tour request comes in, first pause to check your schedule and confirm if you or your team are available at the desired time. Only accept tours for times you can support. It's OK to accept a tour request without knowing in advance if the home is available, but if it isn't, you'll need to reschedule with the customer.

A TIP FOR TEAMS

Streamline scheduling by using routing rules to specifically send tour requests to an admin with access to your team members' calendars.

O

Organize the showing

After you accept the request, Zillow will let the customer know that you're working to confirm the tour, so you should immediately check to see if the home is available for a showing at the requested time. If it's not, find out what other times it can be shown before reaching out to the customer.



U

Update the customer

Text first, then follow up with a call to confirm the appointment. Your goal is to get the customer on the phone for an initial conversation before the tour so you can execute the **ALM** framework (see page 15).

Pro tip: Scheduling showings for more than one property during your appointment gives you an alternative if the first property doesn't work out, while also establishing your value as a buyer's agent.

If the customer doesn't respond after at least six contact attempts spanning phone, text, and email, feel free to cancel the tour and consider the customer to be inactive.

R

Reach out with reminders

Text and email the customer to remind them of your tour appointment — once right after your call and again, closer to the scheduled time. Share the final tour itinerary and confirm where to meet up in your first reminder. A calendar invitation is a great way to make sure everyone has the same information.

If the tour is more than a day away, it's a good idea to send a second reminder 24 hours in advance.

For all tours, send a quick text to the customer an hour before the appointment, but be careful not to phrase it in a way that gives the customer an excuse to cancel. For example, it's better to say, "On my way over to the first property. Look forward to meeting you soon!" as opposed to "Are we still on for 4 p.m.?"

AN IMPORTANT NOTE ON SAFETY

Take the same precautions with tour connections as you do when meeting anyone new. Once you've connected with the customer, plan your tour the same way you would for any other real estate lead. For example, you could suggest meeting at a public location like a coffee shop before continuing on to the property.



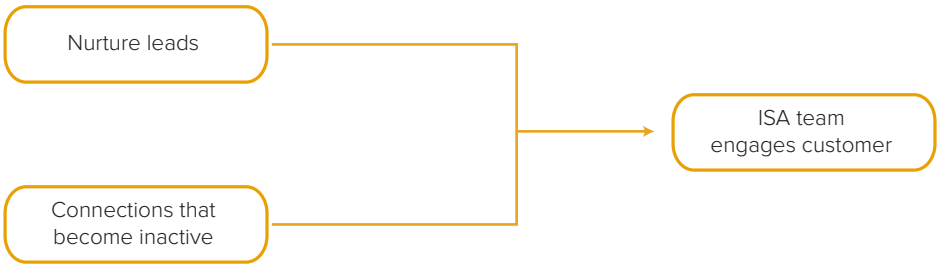
Inactive customers

We define inactive customers as either a) nurture leads or b) connections whom a buyer agent has chosen to move out of their pipeline.

A TIP FOR TEAMS

Sales managers should encourage careful management of the number of active buyers in a buyer agent's pipeline. As a general rule, teams should target having no more than 100 active customers in an agent's pipeline at any time. Customers who have been unresponsive for 2-4 weeks should be removed from an agent's pipeline and become the responsibility of the ISA team for nurture.

Building an effective nurture program



In a real estate team, inactive customers are the province of the ISA team, which might be more accurately called the nurture department. The goal of the ISA is to convert inactive leads to connections for buyer agents. **Remember: Just because a customer isn't ready to close on a home tomorrow doesn't mean that they won't transact in the coming months.** Having a well-planned and executed approach to nurture keeps you top of mind for inactive customers when they decide to reignite their search.

The ultimate goal of the ISA's outreach is to set up either a live transfer or a showing appointment to connect the customer and a buyer agent, depending on what the customer needs. If you're a solo agent, you should focus your outreach for inactive customers on these same goals.

Best practices for nurturing inactive customers

Our best practices for nurturing inactive customers and converting them to connections follow the acronym **COMET**:

C

Customize outreach

Personalize the experience as much as possible. Make customers feel as though you were their only outreach that day. Don't burn through your touches with communications that don't feel like they came from a human being who cares.

Personalization: More than just a name

Customize your touches by leveraging what you know about the customer from past interactions:

- The neighborhood, property type or price point of the original home inquiry
- Specific attributes of the property that you suspect might have piqued their interest
- Any and all communications received from the customer
- What media the customer uses (phone, text, email) and what times of day they tend to respond
- Your notes from phone calls or in-person interactions

Offer value

Every touch needs to offer unique, relevant value to the customer. If the message you're trying to deliver doesn't meet this bar, don't send it. For even more effective customization, try to make the value that's offered relevant to past communications.

Be the source for all things home

The following are just a few types of valuable information you can share with customers:

- Suggestions about other neighborhoods or properties that might be of interest given the customer's original inquiry, saved searches or saved homes
- Updates on market conditions: for example, a table that shows homes sold in the past three months with list and sale prices and your personal assessment
- Information about local developments, such as changes to public transportation routes, school zones or zoning



M

Manage touches

The Zillow Premier Agent app is the right tool to use for active customers. For inactive customers, however, we recommend that teams use a CRM with features like action plans to systematize their approach and manage communications

E

Easy is everything

If your follow-up cadence has a nickname that includes the word “pain,” it’s time to rethink it. If you feel that you need to send blast after blast, your outreach likely needs to offer more value, sound more human or be more customized.

T

Text first

When you don’t have information on the customer’s communication preferences, rely primarily on text and secondarily on calls, with email a distant third. Email may be cheap to set up and leave on auto-pilot, but it delivers few wins.



Quality vs. quantity

We recommend the following **maximum** touches for inactive customers — but if you're doing each touch effectively, you may need far less:



3 total touches the **first day**

7 total touches in **the first week**

10 total touches in **the first month**

2 touches **per month after the first month**





Putting it all together

The prize before you with Zillow Premier Agent is substantial — and it's yours to seize. We're partnering more deeply than ever with professionals who know what it takes to provide great experiences and outcomes for customers at scale. Fully adopting the practices in this playbook, for every customer you meet through Zillow Premier Agent, will help you build the conversion engine that propels your business forward in this new model.

We know you're up to the challenge — and opportunity — ahead.

Zillow PREMIER AGENT™