

# Zillow Flex & Follow Up Boss: Appointment, Location, Motivation



By Dustin Smith

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## Executive Summary

This document provides a comprehensive overview of the Flex Lead Process, offering real estate agents a structured approach to managing Zillow-generated leads. It includes detailed guidance on the following key procedures:

- **Initial Client Call Using the ALM Script:** Guides agents through the Appointment, Location, Motivation (ALM) Zillow script during the initial client interaction to efficiently set appointments, establish rapport, and discover client needs.
- **Managing Client Data in Follow Up Boss (FUB):** This step-by-step guide shows agents how to maintain client profiles in FUB, including noting search criteria and facilitating follow-ups utilizing communication templates.
- **Handling Unique Scenarios:** Addresses strategies for managing challenging situations, such as how to respond to pending property inquiries and engage unresponsive leads through structured nurture plans.
- **Client Interaction Scripts and Compliance Strategies:** Provides pre-crafted Zillow scripts to handle client objections and secure showing agreements, adhering to the [August 17, 2024, Minnesota real estate requirements](#) for agency disclosures and written buyer agreements.

*Zillow Flex & Follow Up Boss: Appointment, Location, Motivation* is designed to support Legacy House Agents in compliance with Zillow's Client Relationship Management (CRM) requirements. Zillow has proven these processes enhance lead conversion rates and guarantee regulatory compliance by documenting the Flex Lead communications within both Zillow Premier Agent and Follow Up Boss.

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## 1. Initial Call: Appointment, Location, Motivation (ALM) Script

When Zillow calls you, accept the call and open the Premier Agent app. The app will display the lead's name and the property they are inquiring about.

**Note:** Wait to pull up the property in NorthstarMLS until after the initial phone call.

### **Appointment (first 30 seconds)**

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This is AGENT NAME; I'm a Zillow partner with eXp Realty. Is this LEADS NAME?

It's great to connect with you. It looks like you're interested in taking a tour of PROPERTY ADDRESS. When is the soonest that I can show you this property?

Perfect! I'll go ahead and schedule that for APPOINTMENT TIME.

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### **Location**

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And were there any other homes that you wanted to see?

Are you looking only in this area?

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### **Motivation**

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What did you like most about this property?

Are there other features you're looking for?

That's awesome; I love that, too. MIRROR THEIR FEEDBACK

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### **Close the Initial Call (total call length 2.5 minutes)**

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I'm going to finish up scheduling this showing. As soon as I receive confirmation, I will give you a call to let you know.

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## 2. Open a web browser and navigate to the [FUB website](#)

Find the Lead under the “People” tab and input their search criteria into notes.

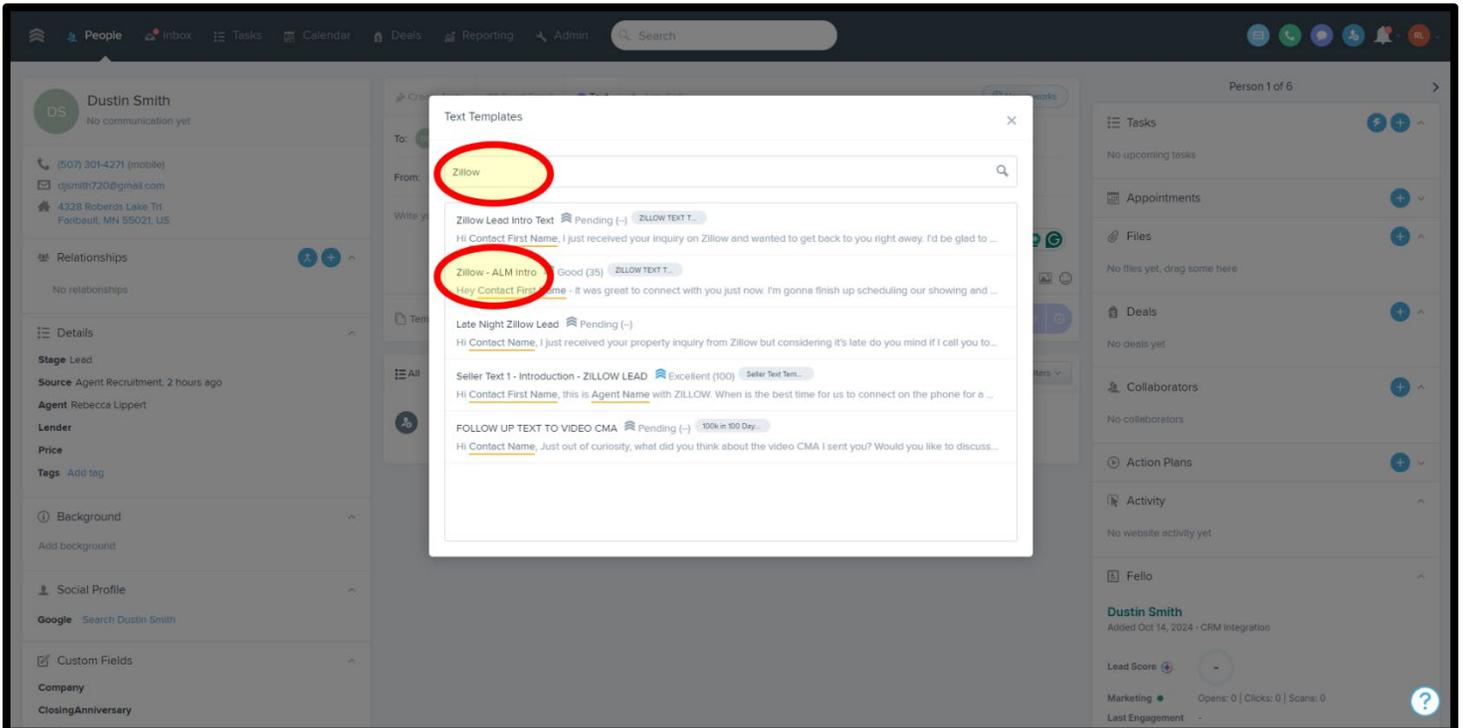
The screenshot shows the CRM interface for a lead named Dustin Smith. The 'People' tab is selected in the top navigation bar. The main content area displays a 'Create Note' form with the text 'Input Lead search criteria here' and 'Then select Create Note'. The 'Create Note' button is highlighted with a red circle. The left sidebar shows the lead's profile details, including contact information and relationships. The right sidebar shows a list of tasks and appointments.

## 3. Send the "ALM Intro" text template to the Lead in FUB

- Select the “Text” tab above the notes section of the client's page. Then select “Templates” below the text box.

The screenshot shows the CRM interface for the same lead, Dustin Smith. The 'Text' tab is selected above the notes section. The 'Templates' button is highlighted with a red circle. The main content area displays a text composition form with fields for 'To' and 'From', and a 'Write your text...' area. The 'Send Text' button is also visible. The left sidebar shows the lead's profile details, and the right sidebar shows a list of tasks and appointments.

- Type “Zillow” into the template search bar and select “Zillow – ALM Intro”.



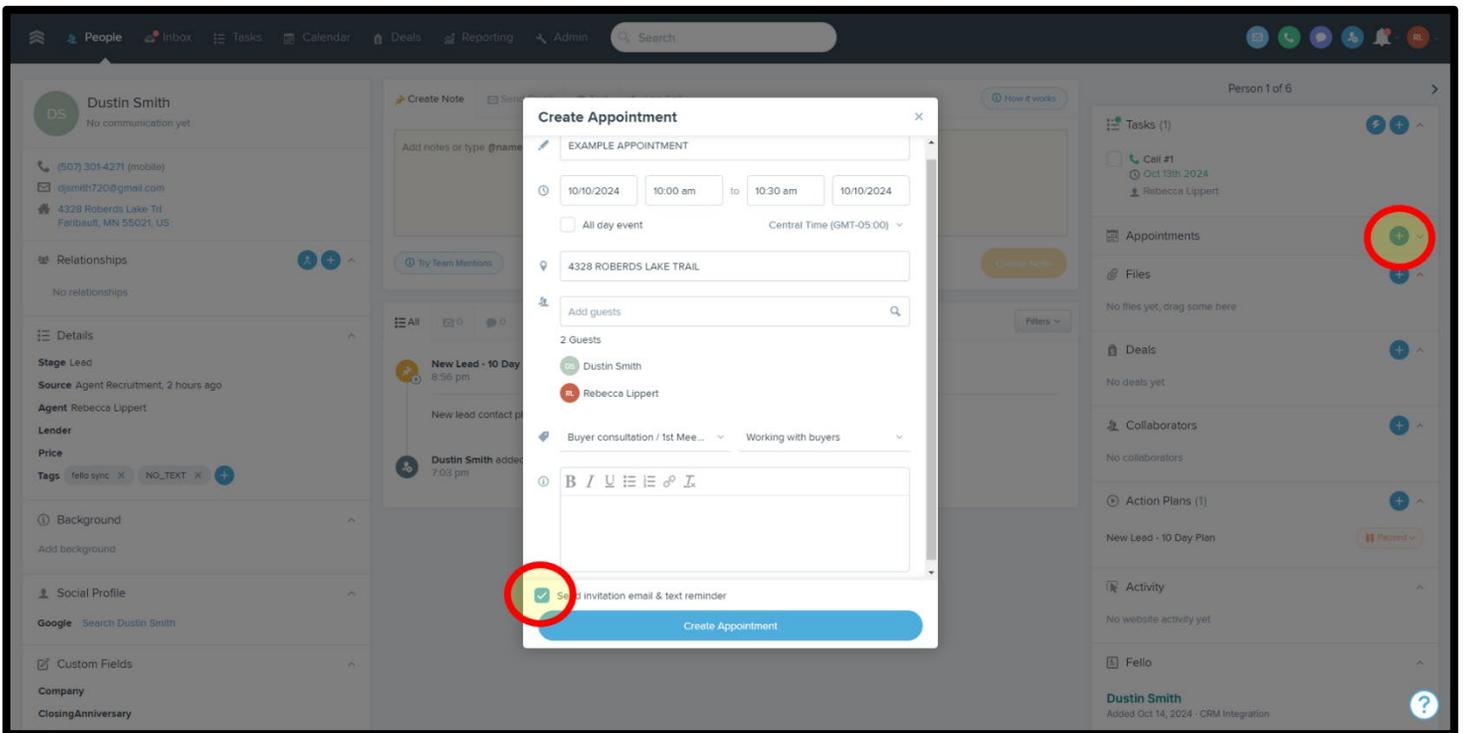
#### 4. Open a new web browser tab and navigate to [NorthstarMLS](#)

- Schedule the appointment in NorthstarMLS.
- Find **2-3** additional properties that fit their criteria.
- Copy the MLS link for the matching property from the web address bar.
- **Note:** Keep this browser tab open to access the additional property links.

#### Select the FUB tab on your web browser

- Find the client using the FUB search function.
- Paste matching property links into their notes section.
- Repeat the copy/paste process (MLS link to FUB notes) for **2-3** properties.
- Add additional information to the client's profile based on your knowledge (address, background, lender, price point, social media).

- Add the appointment to the client's page (Right-side navigation pane).
- Fill in the appropriate appointment details.
- Send the appointment invite. Select the “Send invitation email & text” box.
- **Update the stage to Appointment Set in FUB.**



### If the property is pending:

- Follow ALM to schedule the appointment no matter what, and do not let the client know that the property is pending.
- During the confirmation call, inform them that the property is pending but that you found two other properties that fit their criteria and that you would like to show them these instead.
- If the client is not answering, leave them a voice mail, asking for a call back.
- **Never** inform them over text that the property is pending. You will be ghosted.

## 5. Conformation Call Script

### Agent

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Hey, LEAD, this is AGENT, the Zillow partner you just spoke with. Our showing of PROPERTY ADDRESS is confirmed for APPOINTMENT TIME. Before we meet, I want to ask if anyone has explained the new required changes for Real Estate in 2024?

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### Lead

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I'm not sure. What changes are you referring to?

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### Agent

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The State of Minnesota requires that all Realtors disclose the types of Agency representation available to you and that we have a showing agreement in place before we go into the property. Have you signed these forms with another realtor?

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### Lead (No objection)

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No, I don't have an agent yet, so I haven't seen any forms. Why are they required to see the property?

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### Agent (No objection)

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Consumers have asked for more transparency on what services agents provide and how they are compensated, so the government requires that we disclose this information upfront. Let's plan to meet up 20 minutes before the showing at the MUTUAL LOCATION. The coffee is on me. We can take a few minutes to review these two forms, and I can answer any questions you may have.

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**Lead (Objection)**

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No, I haven't received any agreement, but I don't want to sign a contract to tour a home. Can't you just show the home?

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**Agent (Objection)**

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Unfortunately, I can't. It is something that the law requires. I certainly appreciate not wanting to sign a contract with an agent before you've had a chance to see if they're the right person to work with. I wouldn't want that either. The requirements were established so that consumers know what kind of work Realtors like myself are doing and how we're compensated.

Here's the good news: the showing agreement is a one-page document specific to this property. Our appointment is already confirmed. The agreement allows me to get you into the house you want to see, and we can use this opportunity to talk about your housing needs, the services I provide, and if I am the right person for you to partner with. So, let's plan on meeting 20 minutes before the showing at the MUTUAL LOCATION or on Zoom. We'll go over these two forms, and I'll answer any questions you may have. Which do you prefer?

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**Alternatives to meeting**

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I can email the showing agreement over for you to review and I can answer any questions. Then, when you're ready, you can sign them electronically, and we can meet at the property as planned.

Or, if you have a few minutes to connect on Zoom, I can review the showing agreement with you, answer any questions, and you can sign it electronically.

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### Lead has an Agent they are contracted with

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Okay, were those forms specific to one property or are you under buyer representation with another agent?

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### Lead

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We have an agent we're in contract with.

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### Agent

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Thank you for letting me know. The State of Minnesota has laws in place about interfering with another agent's client, so I legally **can not** show you this property. It will be best for you to reach out directly to your agent.

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## 6. Unresponsive Lead Protocol:

Before rejecting a lead that's been ghosting you, there should be 6 calls, 5 texts, and 4 emails sent to the lead.

This can be accomplished through the "*attempted contact/ghosted nurture plan*" under actions plans in FUB.

If a lead is not re-engaged, they should be transferred to the PHT account in FUB.

## Pipeline Management:

Zillow Flex and FUB have a two-way integration, so anything recorded on one platform will be copied to the other. We ask agents to make all updates in FUB. This will satisfy Zillow's update requirement and protect your Zillow CRM score.

Add in two-way integration setup - See the video on working and managing leads module.