

Zillow Flex Field Manual

Managing Broker: Mark Casper, BK3088942

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Quick Reference — One-Page Summary

This manual is your operational guide for working the Zillow Flex program the right way. Everything in here comes from hard-won experience — what works, what doesn't, and what the program requires. Read it once all the way through. Then keep it close and refer back to it.

PART 1

What This Program Is (and Isn't)

The deal you signed up for

Zillow Flex is a pay-at-closing referral arrangement. No monthly subscription. No upfront fee. Zillow delivers buyer leads and when a transaction closes, a referral fee is paid. That's the deal.

In exchange, Zillow watches how the team works. They track responsiveness, follow-up patterns, CRM usage, and whether buyers are being introduced to their lending partner (ZHL). Perform well and the leads keep coming. Perform poorly and they slow down or stop.

This isn't a passive income source. It's a system that rewards effort, engagement, and execution — consistently, not occasionally.

What kind of leads you're getting

Every Zillow Flex lead arrives one of three ways:

1. Real-Time Tour — The buyer requested a tour of a specific property and Zillow connected them to you in real time. There are two versions: *Confirmed* (Zillow has already set a time) and *Unconfirmed* (the buyer wants to tour but hasn't locked in a time). Either way, the buyer has already raised their hand.

2. Live Phone Connect — The buyer is live on the phone when Zillow hands off the call. Two subtypes:

- **Broadcast** — Zillow sends the call simultaneously to multiple agents. First to accept gets the connection. Speed matters.
- **Direct/Queue** — Zillow sends the call to you specifically. If you don't answer, it rolls to the next agent in the queue.

3. Text/Nurture Lead — The buyer submitted their information but was not available for a live connection. These show up in FUB as New. Your job is to reach out, move them to Attempted Contact, and work the follow-up standard until you get a real answer.

You may also receive calls directly to your Zillow profile number or contacts through your agent page "Contact Us" form. These deserve immediate follow-up — this person reached out specifically to you.

There is no such thing as a cold Zillow Flex lead. Every lead arrived because the buyer was actively looking at a property on Zillow. They are warm by definition. Treat them that way.

PART 1B

Call Procedures and Lead Distribution

How the team is structured for incoming calls

The team operates on a **week-on / week-off rotation**. When your week is on, you are active for all seven days. When your week is off, you are out of the rotation. This structure exists so every agent has a realistic chance of working their leads properly.

When to pause yourself — and when not to

Pause yourself when you will be genuinely unavailable for a meaningful stretch of time — a listing appointment, a showing, a meeting of thirty minutes or more. When you're done, unpause. Do not pause for brief interruptions.

Do not pause yourself just because you already received a lead today. That thins the broadcast pool and puts an unfair share of calls on whoever is still active. Stay in — just follow the ring rule below.

The lead cap

Each agent can receive up to **20 leads per 30-day cycle**. One or two leads per active day is a sustainable and realistic target.

The ring rule — once you have a lead for the day

If you have already received a lead today, wait for the third ring before accepting a broadcast call. This gives teammates a fair shot. But do not wait past three rings — a direct lead that rolls out of FSP goes to another brokerage entirely.

Real-Time Tours — different rules

The priority on RTTs is not distributing them evenly — it is not losing the opportunity. If a conflict arises, the team group chat handles reallocation.

PART 2

The Intake Call

The 30-Second Rule — and the AI That Enforces It

The moment you connect with a Zillow lead, you have 30 seconds to ask for an appointment. Zillow's AI listens to every call and scores whether you asked within 30 seconds. You must hit that mark on at least **80% of your calls**. The script gets you there automatically.

YOUR INTAKE SCRIPT

"Hi [Name], this is [Your Name], your Zillow Premier Agent. Zillow just connected us. I see you're looking at a property or properties in [area]. Would you like to see it today?"

Greeting. Identification. Acknowledgment. Appointment ask. Thirty seconds. That's it. Don't warm up. Don't give background. The appointment ask comes first, every time.

The ALM Framework

- **A — Appointment:** Ask for it within 30 seconds. Everything else follows.
- **L — Location:** Confirm where they're looking. They may narrow or expand it as the conversation continues.
- **M — Motivation:** Why are they moving, and when? This comes out naturally after the appointment ask.

The ZHL Introduction

Before you hang up, every intake call needs a ZHL introduction. Introduce ZHL anyway for every lead — cash buyers, buyers with a lender, anyone. The introduction is your job. The outcome is theirs.

ZHL INTRODUCTION SCRIPT

"Before we go look at anything — have you already connected with a lender about pre-approval? I work with Zillow's lending team. They're fast, no obligation, and it puts us in a position to move quickly. Want me to have them give you a quick call?"

The Salesperson, Not the Order Taker

An order taker waits for the buyer to say what they want. A salesperson moves the conversation forward. When a buyer says "I'm just browsing" — redirect: *"Totally fair. Most of the people I work with started exactly there. Is there a specific area or price range you keep coming back to?"*

You are a salesperson, not an order taker. Your job is to figure out what they actually need and move them toward it — even when they're not sure themselves.

If They Don't Book on the First Call

End every call with one of three things: a specific callback time, a text follow-up they're expecting, or a clear reason they're not buying now logged in FUB. Without one of those three, you lost the lead on the first call.

After the Appointment Is Set

- 1 Confirm the time and the property address.
- 2 Ask: "Is there anything else you'd like to see while we're out?"
- 3 Let them know you'll text your contact info and appointment confirmation.
- 4 Log the call and set the appointment in Follow Up Boss — before you do anything else.

PART 3

Follow Up Boss Is Not Optional

Why every call goes through FUB

Zillow tracks both your answer rate and your FUB usage. Calls from your personal cell do not exist as far as Zillow is concerned.

All calls to Zillow leads are made through Follow Up Boss. No exceptions. No workarounds.

Use your FUB VIP number

Give every Zillow lead your **FUB VIP number** as your primary contact. It routes calls and texts directly to you while capturing everything in FUB automatically. Get it from your FUB settings if you haven't already.

FUB Compliance thresholds

FUB USAGE	YOUR STATUS
90%+	Green — no issues
75–89%	Yellow — warning
Under 75%	At risk of program removal

The five things you must do in FUB for every lead

1. Log every touch.

Auto-logged by FUB:

- Calls through the FUB dialer or your FUB VIP number
- Texts through FUB or the VIP number
- Emails through a connected Gmail or Outlook account
- Zillow Messages (requires Two-Way Integration)

Must be logged manually:

- Showings and in-person meetings
- Calls from your personal cell (don't do this)
- Notes and context from any conversation

Use the microphone. Speak instead of type when entering notes. It's faster, you'll capture more, and AI will summarize it for you.

2. Keep statuses current. Stale statuses hide your real pipeline.

3. Never use Trash. Trash maps to "Rejected" in Zillow's system and permanently breaks the My Agent relationship. Leads that go nowhere go to Nurture.

4. Log the ZHL transfer. One line: "Referred to ZHL." The system timestamps it automatically.

5. Set a next task before you close the file. Every file that gets touched gets a next task before you move on.

Your four daily Smart Lists

SMART LIST	WHO'S ON IT	WHAT YOU DO
Engaged – No Appointment	Spoke to them, no showing scheduled	Push for the appointment

Appointment Set	Appointment confirmed	Confirm, prep, don't let it fall apart
Shown – No Offer	Shown property, no contract	Find the objection. Move forward or triage
Low/No Contact (30+ days)	Haven't reached them in a month	Re-engage or move to BoldTrail

PART 3B

The Morning After: BoldTrail Setup for Every New Lead

Every new Zillow lead needs BoldTrail setup the morning after it comes in. This is the other half of the lead intake process.

The four things you do in BoldTrail for every new lead

- 1. Set the search alert to their actual criteria.** A tuned alert keeps them engaged. A firehose of irrelevant listings gets them to unsubscribe.
- 2. Move their status out of New.** Most go to **Active Lead**. Unreached leads go to **Prospect**. Nobody stays in New.
- 3. Pause the Active Campaign.** This lead is in FUB active follow-up. Pause BoldTrail's campaign until they transition.
- 4. Set a 30-day task: "Review FUB status."** Set it and forget it. Thirty days from now the task surfaces and you cross-reference with FUB.

Can't find the lead in BoldTrail? It's always there — synced automatically. If missing, contact the broker to reassign. Do not create a duplicate.

The 30-day review

If yes, realistic 90-day buyer: Keep active in FUB. Reset the 30-day BoldTrail task.

If no: Move to BoldTrail long-term care.

- 1** Add FUB note: "Moving to BoldTrail for long-term nurture." Move stage to Nurture.
- 2** In BoldTrail: unpause the campaign.
- 3** Change search alert to bi-weekly.
- 4** Done. Campaign includes a monthly/quarterly call task automatically.

PART 4

The Daily Workflow

Morning

FUB (15–20 min): Check Inbox. Review Tasks due today. Work four Smart Lists top to bottom.

BoldTrail (10 min): Check Vitals Dashboard. Review activity signals. Process any new leads.

Midday / Afternoon

Calling time. Work your FUB task list. Update every file you touch with a new task. Every conversation ends with a specific date and time, said out loud.

End of Day (10 minutes)

- Clear or reschedule all overdue tasks
- Move cold leads from active pipeline to Nurture
- Verify every file touched today has a next task
- Check tomorrow's Smart Lists

PART 5

The Cowork System: Coma Patients and Long-Term Care

Nobody dies in this program

When a lead stops responding, we don't trash them or give up. We say they've gone into a coma. **No lead with a valid contact is ever truly abandoned.**

When a lead goes into a coma

- 30 days without meaningful engagement despite active follow-up
- At least 5 genuine outbound call attempts documented in FUB
- No appointment scheduled, no active showing process underway

The BoldTrail transition

In FUB:

- 1 Move stage to Nurture (never Trash).

- 2 Add note with brief reason.
- 3 Create 30-day task: "Check BoldTrail activity — any signs of life?"

In BoldTrail:

- 1 Locate the lead (contact broker if missing).
- 2 Set status to Prospect.
- 3 Set up property search alerts matching original criteria.
- 4 Enroll in long-term drip campaign.
- 5 Set star rating to 1–2 stars.

When a coma patient wakes up

Call the same day when you see: multiple property views, repeated visits to the same listings, email opens on listing alerts, return visits to old properties. The window is short. Call while they're in that mindset.

The final exit

The only way a lead leaves entirely: they explicitly say they're done. Even then, keep them in BoldTrail as a past client. In a few years, they may be a seller.

PART 6

The Standards

Performance metrics

METRIC	MINIMUM	TARGET
FUB Requirement Fulfillment	75%	90%+
ALM Score	70%	85%+
CSAT (Customer Satisfaction)	88	90+
Conversion Rate	5%	8.5%+

Operational health thresholds — Zillow cuts leads immediately below these

METRIC	REQUIRED
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FUB Requirement Fulfillment	75%
Closing Document Submission	75%
Payment Punctuality	95%

ZHL transfer rate — what the brokerage measures

TRANSFER RATE	RATING	WHAT IT MEANS
12%+	★ High	Exceeding the goal
10–11.9%	✔ On Track	Meeting the goal
7–9.9%	⚠ Approaching	Below goal, above floor
Under 7%	✖ Below Floor	Accountability conversation required

The floor is 7%. The goal is 10. One extra transfer per month moves most agents from the floor to the goal.

Income projections

Assumes **10% conversion rate** and **\$3,300.00 per closed transaction**. Zillow income only — total business will be above these numbers.

MONTHLY LEADS	ANNUAL LEADS	CLOSINGS/YEAR (10%)	ANNUAL INCOME
10	120	12	\$39,600.00
15	180	18	\$59,400.00
20	240	24	\$79,200.00

CSAT

Team target is 90+. CSAT is a follow-up discipline score wearing a satisfaction disguise. Stay in contact and your score stays up.

Meeting attendance

Friday 11 AM — Zillow Flex team meeting. Not optional. Attend live or on Zoom, or watch the recording and email confirmation before the next meeting.

Follow-Up Standards

The reality about follow-up and money

FOLLOW-UP QUALITY	CONVERSIONS PER 4 POTENTIAL BUYERS	EFFECT ON INCOME
Poor	0.5	Baseline
Good	1.0	2× income
Great	1.5	3× income

Woody Allen said it best: "90% of life is just showing up." In real estate, 90% of lead conversion is just following up when you said you would.

The follow-up standard — 30 days, not 7

A lead stays in active follow-up for 30 days — or until they explicitly say stop. At 30 days, you can move to Nurture only if you have **at least 5 genuine outbound call attempts** in FUB. A genuine attempt = reached them live OR left a voicemail. A call that rang with no message does not count.

The Terminator Voicemail

TERMINATOR VOICEMAIL

"Hi [Name], it's [Your Name], your Zillow Premier Agent. Sorry I missed you — I have some information about the property you were looking at. I'll try you again tomorrow at 6:00. If that works better for you, feel free to give me a call — if you have two or three minutes between now and then, I'm around."

Then call at 6:00. On the dot. Not 5:58. Not 6:02. The time you said.

Calling at exactly the stated time is a signal. You're demonstrating before you've ever met them that when you say you'll do something, you do it.

CALLBACK AT STATED TIME

"Hi [Name], it's [Your Name]. I told you I'd call at 6:00 — so here I am. Do you have a few minutes?"

Sound like you know them

GENERIC (LOW CONVERSION)

"Hi John, just checking in to see if you're still looking. Let me know if I can help!"

SPECIFIC (HIGH CONVERSION)

"Hi John, I saw a 3-bed in Citrus Hills just listed at \$289,000.00 — it has the single-story layout you mentioned. Moves fast in that neighborhood. Worth a quick look this week?"

PART 8

Pipeline Hygiene

The rule on lead status

- **New** leads must move out within 24 hours.
- **Never move backward** — forward through the funnel or sideways to Nurture.
- **Nurture is not the trash.** Nurture = long-term BoldTrail care.
- **Trash is never used for Zillow leads.** Not once. See Part 3.

Weekly pipeline hygiene — 20 minutes

Walk your active pipeline: is each lead actually where you put them? Move cold leads to BoldTrail. Keep your active pipeline focused on what's real.

PART 9

What Gets Measured at the Friday Meeting

METRIC	WHAT IT TELLS THE BROKER
Connections received	Lead volume — is the team healthy?
ZHL transfers	Are you asking every time?
Transfer rate %	Your single most controllable metric
Eligible met-with	What the real funnel looks like
Pre-approvals	ZHL's conversion of your transfers
Closing rate (4-week trend)	Are you converting showings to contracts?

FUB call volume

Are you doing the work?

Smart list status

Is your pipeline clean and current?

CSAT rating

Are customers satisfied?

The meeting is a coaching session with data, not a performance review. Come prepared — know your numbers before you walk in.

Closing rate

The broker tracks 4-week rolling direction, not single-week snapshots. One bad week is noise. Three consecutive bad weeks is a signal.

PART 10

The Commitment Standard

What staying on this team means

Starting July 1, 2026, every agent on this team is here by choice — and that choice is documented. Before the second half begins, every agent signs a commitment: I understand the standards, I want to be on this program, and I'm committing to the work.

The floors — simple and non-negotiable

ZHL Transfer Rate: 7% minimum. Below this triggers an accountability conversation. Not hostile — a sit-down to figure out what's broken. But it happens every time.

ALM Score: 70% minimum. Zillow's AI scores every call. Follow the intake script and you hit 70% without thinking about it. Falling below means you're not using the script.

Conversion Rate: 5% minimum. This is the floor, not the goal. Target is 8.5%. Below 5% on a 4-week rolling basis means we sit down and walk through your pipeline together.

Closing Rate: directional improvement over any 4-week window. Moving in the right direction and willing to talk about what's in the way.

CRM engagement: your work has to be in the system. If it isn't in FUB, it doesn't exist for accountability purposes.

Who runs this program — and who owns it

This program belongs to BHHS Florida Showcase Properties. Every lead belongs to the brokerage — not to the agent it is assigned to. The referral fee is the brokerage's obligation. Agents on this team do not pay the referral fee. The

brokerage does.

If you leave

There is no taking Zillow leads with you. If leaving real estate: leave every FUB file fully updated. If moving to another brokerage: same cleanup, plus you may identify up to **five leads** to negotiate a handoff with a staying team member.

- 1 You and the staying agent negotiate a split. The brokerage does not set terms.
- 2 Add the staying agent as a collaborator on the lead in FUB.
- 3 You write a note documenting the agreement.
- 4 The staying agent writes a separate confirming note.
- 5 Notify the broker before your license transfers.

All other leads transfer to the broker upon departure and are reassigned.

What the broker will do for you

The broker will meet with you anytime — weekends, evenings. He will pull your FUB data and walk through your pipeline to find where leads are dropping. Use it. What he will not do is carry agents who aren't making a genuine effort.

PART 11

Buyer Representation

Getting a lead on the phone is step one. Getting in the car is step two. Getting a signed agreement is step three — the step that turns a showing into a client relationship.

The agreement hierarchy

1. **Zillow Touring Agreement (preferred)** — Often already signed before you arrive. If not, use it at the door: *"Zillow requires a quick form before we go in — no long-term commitment, 60 seconds."*
2. **BHHS Touring Agreement (backup — always have copies in your car)** — Same conversation, same framing.
3. **EBBA — Exclusive Buyer Brokerage Agreement (the goal)** — Full representation. Standard terms: 6 months, Citrus County plus Sumter, Marion, Levy, and Hernando counties, 3% buyer representation compensation. Explain it as: where, how long, how compensation works (seller covers it in 90%+ of transactions).
4. **Non-exclusive showing agreement (last resort)** — Covers specific homes toured together only. Use as a bridge, not a destination.

When to go for the EBBA

After the first showing, before the second meeting. Transition language: *"Now that we've had a chance to look at some homes together, I'm confident I can help you find the right one. Do you feel comfortable with me guiding you the rest of the way?"*

Never go out for a second showing without a signed agreement. A first showing without paperwork can happen. A second showing without paperwork is a choice — and it's the wrong one.

If they push back

Ask first: *"Is it the commitment itself that concerns you, or are you not sure whether you want to work with me specifically?"* Two different conversations. If they won't sign anything: *"I work with a limited number of buyers so I can give each one proper attention. If you decide you'd like to move forward, I'd love to reconnect."* Then move on.

For more detail

Refer to the **BHHS Florida Showcase Properties Policy & Procedures Manual**, Section on Buyer Representation.

PART 12

Transaction Logging

Logging is a contractual obligation. Late or missing logs create flags in Zillow Partner Hub that require the broker's time to resolve. Four flag types: Overdue, Missing Closing Docs, Potential Unreported, Closing Date Changed.

Accountability note (effective July 2026): Transaction logging compliance reviewed monthly. Recurring flags will be addressed directly. There is no good reason to generate flags.

The four situations — and when to log

1. Under Contract — Log in Partner Hub within **48 hours**. Fields: buyer name, address, contract price, projected close date, agent name.

2. Closing Date Changes — Update Partner Hub immediately. One update takes 90 seconds. The flag it prevents takes the broker 20 minutes.

3. Cancellations — Log right away. Don't leave an active pending record on a dead deal.

4. Closed Transactions — Log within **5 business days** and upload all closing documents.

Where to log

All transaction logging: **Zillow Partner Hub** at partners.zillow.com. Also update **Follow Up Boss** — the two systems are separate. Updating one does not update the other.

Documents required at closing

DOCUMENT	WHEN REQUIRED
Executed Purchase and Sale Contract	At logging (under contract)
Settlement Statement (HUD-1 or ALTA)	At closing log
Any addenda affecting price or terms	At closing log if applicable

QUICK REFERENCE

The Essential Checklist

Every intake call

- ☐ Appointment ask within 30 seconds
- ☐ ZHL transfer introduced before hanging up
- ☐ Call logged in FUB before anything else
- ☐ Next task set in FUB

Every day

- ☐ FUB Inbox reviewed
- ☐ Four Smart Lists worked in priority order
- ☐ BoldTrail Dashboard checked for activity signals
- ☐ Every file touched has a next task before end of day
- ☐ Cold leads moved to Nurture / BoldTrail with note

Every week

- ☐ Pipeline hygiene — active leads are actually active
- ☐ FUB usage above 75%
- ☐ At least one ZHL transfer per 10 connections
- ☐ Friday meeting attended or recording watched + confirmed

BoldTrail checklist (moving a coma patient)

- ☐ FUB stage: Nurture
- ☐ FUB note: brief reason
- ☐ FUB task: 30-day BoldTrail check
- ☐ BoldTrail: lead located
- ☐ BoldTrail: status = Prospect
- ☐ BoldTrail: search alerts set
- ☐ BoldTrail: enrolled in drip campaign

Every transaction (Partner Hub)

- ☐ Log Under Contract within 48 hours
- ☐ Update close date immediately if it changes
- ☐ Log cancellation immediately if deal falls through
- ☐ Log Closed within 5 business days
- ☐ Upload all closing documents
- ☐ Update FUB stage to match

APPENDIX A

Scripts at a Glance

INTAKE APPOINTMENT ASK

"Hi [Name], this is [Your Name], your Zillow Premier Agent. Zillow just connected us — I see you're looking at properties in [area]. Would you like to see something today?"

ZHL TRANSFER

"Before we go look at anything — have you already connected with a lender about pre-approval? I work with Zillow's lending team. They're fast, no obligation, and it puts us in a position to move quickly. Want me to have them give you a quick call?"

TERMINATOR VOICEMAIL

"Hi [Name], it's [Your Name], your Zillow Premier Agent. Sorry I missed you — I have some information about the property you were looking at. I'll try you again tomorrow at [time]. If that works better for you, feel free to call me."

CALLBACK AT STATED TIME

"Hi [Name], it's [Your Name]. I told you I'd call at [time] — so here I am. Do you have a few minutes?"

SPECIFIC FOLLOW-UP TEXT

"Hi [Name], I saw [property] just listed at [price] — it has [feature they mentioned]. Worth a quick look? I have time [day] or [day]."

BOLDTRAIL REACTIVATION CALL

"Hi [Name], I noticed a few new listings came up in [area] that match what you were looking for back in [month]. I thought of you right away. Have you been keeping an eye on anything?"

TOURING AGREEMENT INTRO

"Before we go in, Zillow requires a quick form — it just confirms I'm your agent for today. No long-term commitment, no obligation. Takes about 60 seconds."

EBBA ASK (AFTER FIRST SHOWING)

"Now that we've had a chance to look at some homes together, I'm confident I can help you find the right one. Do you feel comfortable with me guiding you the rest of the way?"

IF BUYER WON'T SIGN ANY AGREEMENT

"I've really enjoyed meeting you, and I believe I can help. I work with a limited number of buyers so I can give each one the attention they deserve. If you decide you'd like to move forward together, I'd love to reconnect."

APPENDIX B

Key Contacts

ROLE	NAME	NOTES
Managing Broker	Mark Casper	BK3088942 · (352) 364-1947
Team Leader / Sales Manager	Russell Barber	(352) 630-3193 · rbarber.re@gmail.com
Zillow Success Manager	Edward Jenkins	Contact through Russell or Mark
Zillow Partner Support	—	1-888-466-3501

Zillow Flex Payments

—

flexpayments@zillowgroup.com

Office

BHHS Florida Showcase
Properties

(352) 746-0744 · 2450 N. Citrus Hills Blvd., Hernando,
FL

APPENDIX C

Zillow Flex Team — Agent Commitment Form

Completed once at the beginning of each commitment period. Keeps on file with the broker.

BHHS Florida Showcase Properties — Zillow Flex Team

Agent Commitment Form · Effective July 1, 2026

AGENT NAME

LICENSE NUMBER

By signing below, I acknowledge and agree to the following:

- I have read the FSP Zillow Flex Field Manual and understand the operational standards it describes.
- I understand that all Zillow Flex leads belong to BHHS Florida Showcase Properties.
- I will conduct all outreach to Zillow leads through Follow Up Boss and maintain FUB usage at or above 75%.
- I will introduce Zillow Home Loans on every eligible connection and maintain a ZHL transfer rate at or above 7%.
- I will log all transactions in Zillow Partner Hub on time: under contract within 48 hours, closed within 5 business days.
- I will attend the Friday Zillow Flex meeting or watch the recording and confirm in writing before the next meeting.
- I understand that falling below program floors will result in an accountability conversation with the broker.
- I am choosing to be on this team because I want to be — and I am committing to the work.

AGENT SIGNATURE

DATE

Broker acknowledgment

BROKER SIGNATURE

DATE

BHHS Florida Showcase Properties

2450 N. Citrus Hills Blvd., Hernando, FL 34442 · (352) 746-0744

Prepared by Mark Casper, Managing Broker

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This manual is a living document. When you receive an updated version, replace the old one.