

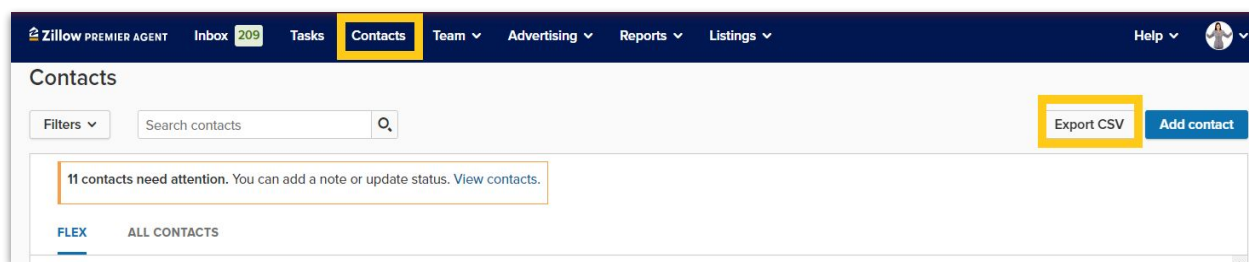
Zillow Home Loans pipeline management

Instructions to export and
leverage inbox data

This document provides step-by-step instructions on exporting Zillow Home Loans transfer data from your inbox. This will enable you to identify opportunities within your team for improvement on transfer and engagement rates when buyers who have opted in are ready to discuss financing with Zillow Home Loans.

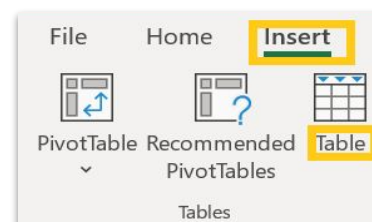
Step 1: Export the Data

- Log into [Zillow.com](https://www.zillow.com)
- Click on [Contacts](#)
- Once on the Contacts page, click [export to CSV](#)



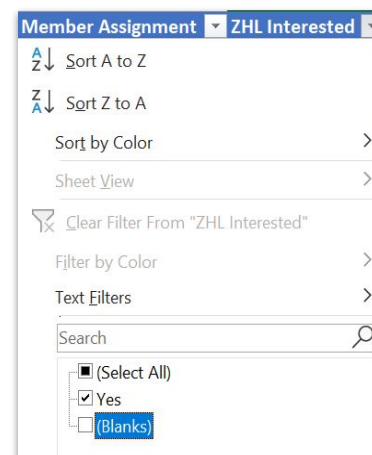
Step 2: Format the Data

- Open the CSV in [Microsoft Excel](#)
- Click [insert](#)
- Select [Table](#)



Step 3: Filter the Data

- Click the drop-down arrow in the [ZHL Interested](#) column and unselect (Blanks).
- You may also filter for a [specific time range](#).
- Click the drop-down arrow in the Create Date column, and select the months of the performance evaluation period. Click OK.



By the end of this exercise you will have filtered your data to only show contacts who are **interested in ZHL**, have been **successfully transferred to ZHL** and those that are most likely **ready to be transferred to ZHL**.

Step 4: Segment the Data

- Click the drop-down arrow in the **ZHL transferred** column, and select Sort A to Z.
- Highlight in the color of your choice, all buyers with a status of **Yes** in both the **ZHL Interested** and **ZHL Transferred** columns.

Next, highlight buyers who are **interested in ZHL but have not yet been transferred**. This is an opportunity for agents to take action.

- Click the drop-down arrow in the **Status** column, and select all connections that have an active contact status. This includes **Met with Customer, Showing Homes, and Submitting Offers**. These contact status indicate the agent should have had the opportunity to transfer to ZHL.
- Highlight in a second color of your choice, all buyers that have not yet transferred but are in active contact statuses.

Finally, unfilter the **Status** column, then sort **Team Member Assignment** alphabetically: this makes it easier to visualize volume of opportunity by agent.

- Click the drop-down arrow in the **Team Member Assignment** column and click **Sort A to Z**.

This should enable you to see each agent, alongside **each buyer that has indicated interest in ZHL**. This process should make it easy to identify which buyers are likely to be the **best candidates for a successful ZHL transfer**.

Coaching Tip

As you host coaching conversations with your agents, try to gauge why the agent has not yet transferred these connections to Zillow Home Loans:

Do they lack ZHL product conviction?

Do you have the systems in place to remind agents to transfer to ZHL?

Do you have scripting available to agents for elegant transfers?

Growth Advisor

Once you diagnose the opportunity, offer coaching and guidance accordingly.

As always, feel free to engage your Growth Advisor if they can provide additional resources or support.

More Information on Zillow Home Loans

[Zillow Home Loans Landing Page](#)

[Working with Zillow Home Loans](#)

