



Getting Started Guide:

Agent Connection Planning

Agent Connection Planning enables you to optimize your team's Zillow PreferredSM partner agent performance by recommending target buyer connections across your team using historical agent performance data.

This tool distributes connection volume based on agent performance to improve your team's results. Zillow provides connection targets for each active agent to drive transactions and efficient connection management, saving you time for deepening client relationships.



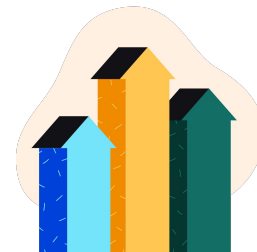
Create accountability

The Agent Performance Report provides a holistic ranking report to track your team's KPIs.



Maximize your time

Agent Connections Planning streamlines the process with personalized connection targets for each agent.



Optimize performance

Distribute and pace connections using a data-driven partner plan.

How do I access Agent Connections Planning in the PA app?

Team Leads can access "Connection Planning" within the Premier Agent app in the "Team" tab.

The screenshot shows the Zillow Premier Agent app interface. The top navigation bar includes 'Inbox 3', 'Tasks', 'Contacts', 'Team' (highlighted with a red box), 'Advertising', 'Reporting', and 'Listings'. The left sidebar shows 'Agent capacity & lead routing' with sub-sections for 'PERFORMANCE' (Agent capacity, Zillow Preferred performance, Call pickups) and 'ROUTING' (Lead routing, Routing settings, Expertise scores, ZIP coverage). The main content area is titled 'Agent capacity' and includes a 'Distribution of connections' chart showing 60% High performers, 30% Fair performers, and 10% Low performers. Below this is an 'Alignment with recommended connection targets' bar chart showing 90% aligned. A search bar for agents is present, and a table lists agents with their performance metrics.

Agents	Perf rank	Status	Predicted CVR	ZHL Pre-approvals	Cxns L30D	Rec cxn target	Agent requested target	Current cxn target
Julie Hudson	High	Active	5.2%	1	21	12	12	14
Hanna Dorwart	High	Active	5.2%	1	21	12	12	14
Talan Vaccaro	High	Active	5.2%	3	21	12	12	14
Charlie Ekstrom Bothman	High	Active	5.2%	0	21	12	12	14
Skylar Mango	High	Paused by agent	5.2%	0	21	12	12	14
Desirae Schleifer	High	Active	5.2%	0	21	12	12	14

Connection Targets

Connection targets use a data-driven system to optimize your team's Zillow Preferred program, performance by distributing connections based on individual performance.

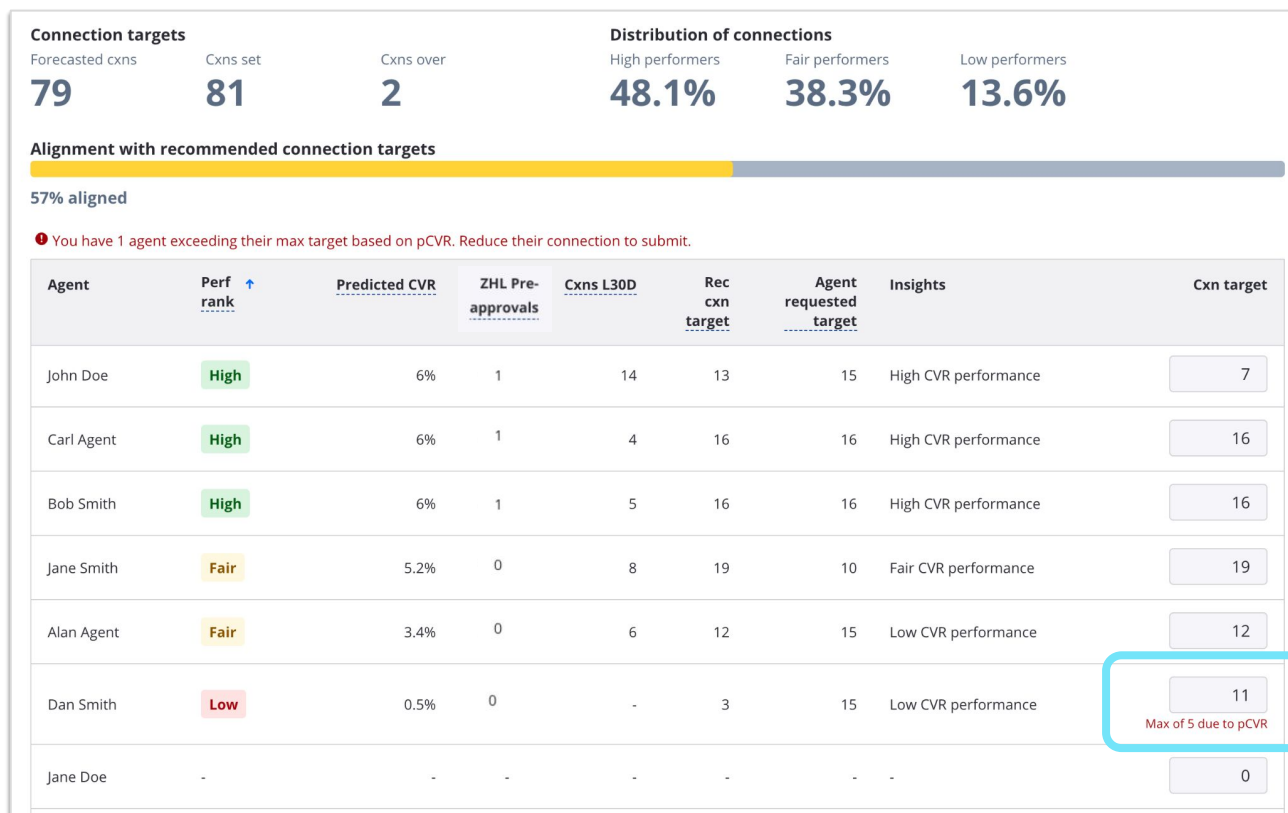
Effectively distribute and pace connections to your highest-performing team members to drive more transactions based on metrics like **predicted conversion rate (pCVR)**.

What is Predicted Conversion Rate (pCVR)?

pCVR helps Zillow evaluate agent performance more accurately by smoothing out short-term fluctuations. It accounts for lead conversion delays, geographic differences, and small sample sizes—making the measurement fairer and more reliable. Simply put, pCVR is based on market averages, the agent's actual conversion rate, and connection volume over the last 180 days.

Agent Connection Target Caps

Teams are now limited from setting a target >1.5X Zillow's recommendation for agents with **<3.5% pCVR** when assigning connection volume. Teams with ISAs can label their ISAs to have them be exempt from the target cap.

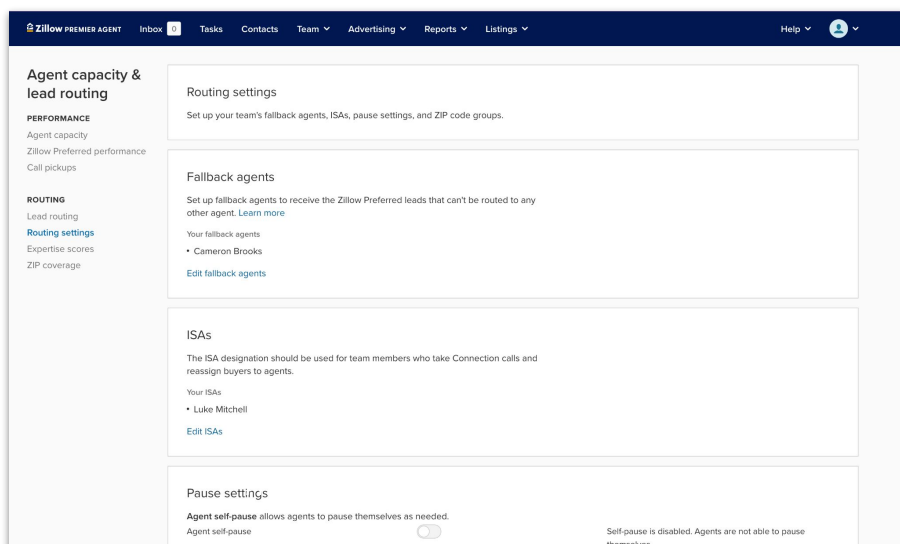

Alignment with recommended connection targets

57% aligned

Teams with ISAs

Teams will be able to label ISAs on their team from the Routing Settings page, and they will be exempt from the target group.

ISAs will not show up on the team Leaderboard and may be excluded from other features, such as lead incentives.



Agent Connection Planning Schedule

New Plan Available At the end of the month, once new team Zillow Preferred campaigns become available (usually the fourth Thursday), your new plan will be available to review and edit in the Premier Agent desktop app. Connect with your Growth Advisor to make adjustments together or adjust them on your own.

Entry Deadline: Submit your connections targets into the planning tool by Friday of the next week to have Zillow automatically distribute connections based on the selected targets for your team.

Zillow PREMIER AGENT

Inbox 3
Tasks
Contacts
Team
Advertising
Reporting
Listings

Help

Agent capacity & lead routing

PERFORMANCE
Agent capacity
Flex performance
Call pickups
ROUTING
Lead routing
Routing settings
Flex expertise

Agent capacity

Ensure Zillow Preferred agents work with the ideal number of connections. [Learn more](#)

It's time to review and update your team's connection targets for next month. Submit your updates by **December 10**, or we'll default to our recommended targets to help your team's performance.

[Start connections planning](#)

Search for an agent

Agents	Perf rank	Status	Predicted CVR	ZHL Pre-approvals	Cxns L30D	Rec cxn target	Agent requested target	Current cxn target
Julie Hudson	High	Active	5.2%	1	21	12	12	14
Hanna Dorwart	High	Active	5.2%	1	21	12	12	14
Talan Vaccaro	High	Active	5.2%	3	21	12	12	14
Charlie Ekstrom Bothman	High	Active	5.2%	0	21	12	12	14
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Performance Tips

- After the campaign refresh, review and “submit” Zillow’s recommended targets.
- Aim to align with Zillow’s recommendations, which are optimized according to recent agent performance data from your team.
- Adjust connection targets based on your team’s unique situation for that month.
- Be sure to review ZIP code coverage to help your team get the most out of every connection opportunity.

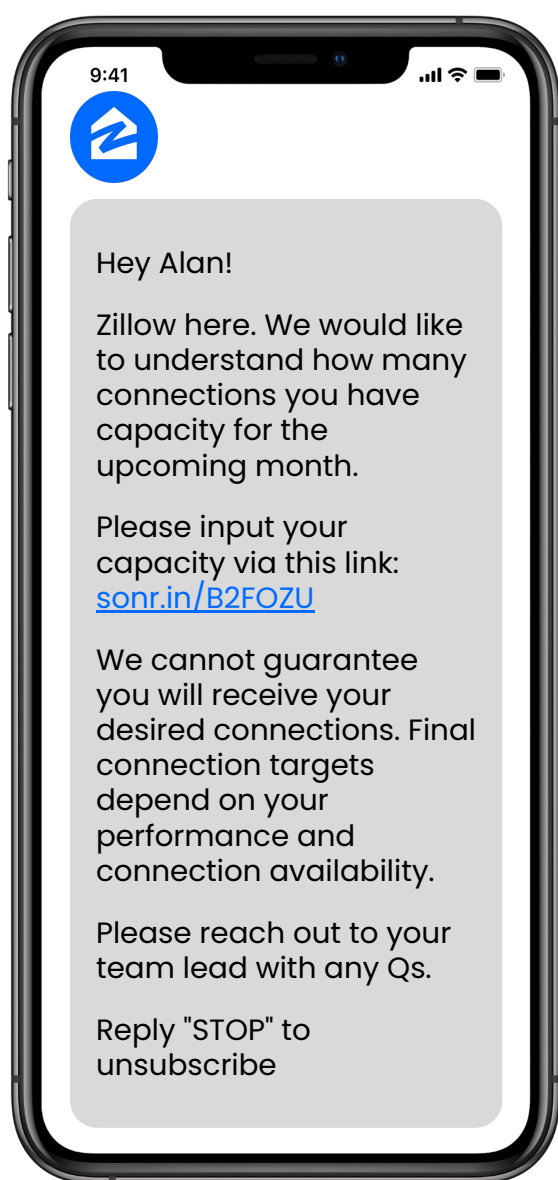
Agent Connection Planning SMS Texts + Push Notification

Every month, Zillow will send SMS reminders* to your agents to complete their agent connection planning. Here's an overview of the text messages your agents can expect. The text will come from +1 (602) 693-1740.

*Agents will receive two reminders if they do not complete their inputs after the 1st Desired Cxn Capacity SMS.

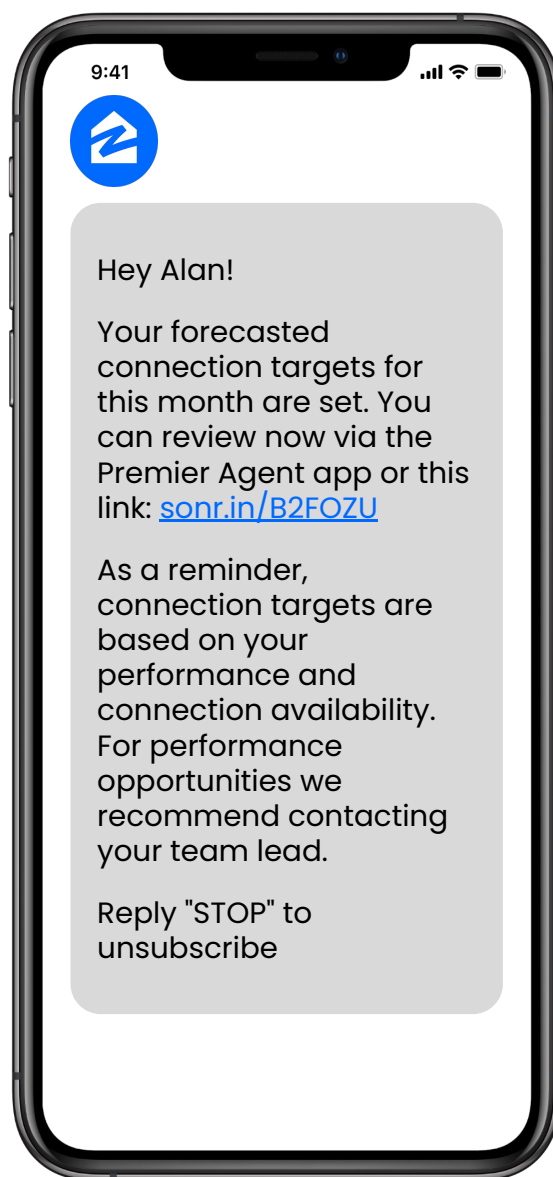
1 **Desired Connection Capacity SMS**

Sent the week before refresh go live date



2 **Post Connection Target Forecast SMS**

Sent the week after planning deadline



Frequently Asked Questions

Will I be able to access this tool on my mobile device?

No, this tool will only be available on the desktop Premier Agent CRM.

Does the Team Lead have to use the connection targets Zillow recommends?

We recommend that you align as closely as possible to the provided data-driven agent targets to maximize your team's performance, but we empower you to make necessary adjustments.

What happens if I don't submit agent connection targets by the entry deadline?

If you are unable to submit targets by the first Friday of the month, we will default to Zillow's recommended targets for the current month. We strongly recommend prioritizing the planning process and reaching out to your Growth Advisor if you have any questions.

Can I make changes to my plan after I select Save and Submit?

Yes. From the Agent Capacity page, you can make adjustments to your plan using the Capacity targets.

Who receives the Agent Connection Planning SMS reminders?

Agents who have received at least one connection in the last 45 days.

When will my new agent show up in the UI? What should I set their target to?

After the agent is onboarded, the agent will have access to agent connection planning. We recommend that the Team Lead set the new agent to a target of 5 connections.



Zillow Preferred partner teams operating with Inside Sales Agents (ISAs)

How should teams who use Inside Sales Agents (ISAs) use Agent Connection Targets?

Team leaders should include ISAs in the connection planning process to align on targets for each agent team member. We recommend that ISAs receive access to the team account to be able to reference the aligned connections plan in the Agent Capacity tab within the Premier Agent app.

What connection target should I set for my ISA?

We recommend first setting the ISA to a target of 1, then set all agents to their ideal targets (based on performance). If teams want ISAs to be the only ones receiving inbound calls they would need to pause all agents on the team.

How should ISAs allocate connections for their team?

Zillow recommends that ISAs fill from the top of the list – routing a connection to the available and eligible agent closest to the top (highest-performing agent).

- ISAs manually allocating connections should independently track how many connections they have given to their team.
- Note: Measurement of connections over the last 30 days in the Premier Agent app is currently on a 48-hour refresh cycle.