ZipQuote
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Agent Spotlight:

Anthony Santiago

Driving Success with Process and Accountability

Anthony, a new agent in Scottsdale, Arizona, launched his agency in August 2025 with a clear focus: build his book primarily through internet leads. With a lean team of three handling both sales and service, he emphasizes a disciplined sales process and strong CRM accountability.

Agent Profile

👤 Agent Name
Anthony Santiago

📍 Location
Scottsdale, AZ

🗓 Agent Since
2025

👥 Team Size
3 people

Lead Source Performance

Anthony utilized a mix of lead vendors to generate the necessary volume. He provided a clear comparison of his closing ratios (based on policy count from multi-lining) across different lead sources:

Lead Provider	Total Leads (Approx.)	Closing Ratio	Quality Standout
ZipQuote	183	6.67%	High quality; leads were consistently multi-car/ homeowner and actual homeowners (not ineligible mobile homes).
Vendor A	190	3.23%	High volume but lower premiums and poor quality (customers looking for "less than $45" insurance).
Vendor B	359	1.96%	Lowest close rate.

ZipQuote delivered stronger premiums and more accurate filtering, despite not being the highest-volume source.

Key Insights

Anthony stresses that success with internet leads comes down to two things: **process and accountability**.

His core rule:

> *"Don't claim a lead unless you have the capacity to work it right then"*

His Follow-Up Framework

▸ **Immediate Action:** Only claim leads you can contact right away.

▸ **Automated CRM Plan:** Apply a structured follow-up sequence immediately.

▸ **First 10 Days:** Daily follow-up tasks, including two calls on day one, templated texts, and preparing a "ghost quote."

▸ **What is a Ghost Quote?** A ghost quote is a quote prepared in advance using assumed coverage details so you're ready with pricing when you reach the prospect, speeding up the conversation and increasing close probability.

▸ **Built-In Accountability:** The CRM makes it easy to confirm the process is being followed.

He also notes that **newer agents benefit from consistent check-ins** and a dedicated contact who can provide guidance and reinforce accountability while systems are being built.

Turn Insight Into Action

▸ **Action:** Review your team's lead claiming protocol.

▸ **Goal:** Ensure **leads are only accepted when they can be worked immediately**—eliminating delays and improving close rates.

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