

CUSTOMER SUCCESS STORY

How Steadily Powers its Operational Efficiencies with AgentSync

Steadily is a tech-enabled MGA focused on delivering superior landlord insurance, but they were spending too much time on manual tracking and spreadsheets, despite having a compliance solutions vendor.

After putting AgentSync's flagship Manage product in place, the team now uses automations to power the kind of "set-it-and-forget-it" approach to license validation that lets them invest more time into growing their core business.

“ We wanted to be able to automate, to set and forget it, and with AgentSync, we set up a person with a profile, say they're supposed to have those licenses, and the system just does what it's supposed to do and flags if they don't have it. I don't think any of the other systems have that level of workflow for managing and processing licenses.

DATHA SANTOMIERI, CO-FOUNDER AND COO

STEADILY.

Steadily can measure the success of its partnership with:



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“ We have built the most sophisticated landlord insurance solution in the marketplace, and, as we grow, we’re trying to be conscious of our resources and stay very light on the operational side. **With AgentSync, we’re able to do more with fewer people. If I can have one person devote a fraction of their time to licensing instead of having an entire person dedicated to it, then that person is free to do other things.** ”

DATHA SANTOMIERI, CO-FOUNDER AND COO

Legacy tech and spreadsheets: A messy recipe for insurance agent licensing

Steadily is a tech-enabled managing general agency (MGA) focused on building the most robust landlord insurance solution in the marketplace. Prior to working with AgentSync, the business’s internal agency was 75 agents strong, with each licensed across all 50 states. Steadily’s leadership team realized keeping up with licenses and renewals would require one of two things: A committed manual effort by a team of seasoned industry pros, or a distribution channel management (DCM) software that could make compliance a streamlined, automatic process.

After a request for proposal (RFP) process, Steadily settled on a legacy industry leader, the Sircon platform. But the staff soon realized tracking and submitting agent licenses through the platform still required them to maintain spreadsheets to track data like application and renewal dates. The amount of manual compliance work alongside the software posed an operational drag, said Datha Santomieri, Co-Founder and Chief Operating Officer at Steadily.

Processes as simple as setting a new state license or simply submitting an agent license renewal often required Santomieri or other operational staff to pause everything else while they figured out the compliance details. Not only was it time-consuming, but the lack of visibility also meant a missed line in a spreadsheet could lose real dollars for the business.

“*There’s no way to set up any kind of rules with Sircon. All of our agents are 50-state licensed agents, and, with Sircon, there’s no easy way to tell where licenses need attention. If an agent was missing a license, you had to go through each state to identify what they need.*”

DATHA SANTOMIERI, CO-FOUNDER AND COO



On multiple occasions, Santomieri said the team resubmitted applications for licenses or renewals. Because their platform didn’t have notifications or visibility built in, the system let them resubmit and pay fees multiple times.

Agent licenses become a catalyst for change

When the operations team member who had been managing licenses and compliance left the company, Santomieri temporarily jumped in. On seeing how manual and time-consuming the process was, even with a software solution, Santomieri quickly decided they needed a change.

“It made me mad,” Santomieri said. “Sircon is from 1995. It can’t do what we need, and we were paying an arm and a leg for it.”

AgentSync had been one of the potential partners Steadily evaluated during the same RFP in which they selected Sircon. But, after Santomieri’s experience, the team agreed to revisit what they’d seen in demos of AgentSync’s automated license management. Maintaining a radical focus on the core business of landlord insurance required staff to wear multiple hats with minimal distractions, and AgentSync could clearly support that with its automations and self-serve features.

“ *AgentSync was set apart because of the workflows. Most of the other platforms didn't have the robust level of rules generation we wanted.*

DATHA SANTOMIERI, CO-FOUNDER AND COO

Workflows that work: How AgentSync helps Steadily level up

Steadily staff used to spend hours each month on emails to agents: Reminders of continuing education (CE) deadlines, reminders for missing personal information, reminders for renewals,. Now those are all on automated, timeline-driven email alerts, freeing up the Steadily team to focus on higher-impact work.

“ *Agents get notified when they haven't done the things they're supposed to do. So there's very little chasing people. We don't have to employ a team of people just to send out emails and follow up on things because we set the system up to do what we needed it to.*

DATHA SANTOMIERI, CO-FOUNDER AND COO

With state rules, context, and logic built into the foundation of AgentSync Manage, the Steadily staff spends less time than ever on the repetitive administrative tasks of compliance even as they have grown their agent force to 110. A self-service portal and transparent workflows also give licensees the ability to log in and check their own licensing status and data, which means the Steadily operations team and agents alike spend less time on administration and more time uncovering opportunity for the thriving young business.

Adopting AgentSync's Manage took Steadily's compliance operations from chaotic to calm—in just a few months, licensing stopped being a daily source of frustration and instead became a low-effort process the team rarely has to think about.

What automating compliance means for Steadily

Santomieri and the Steadily team are glad to no longer pay wasteful fees for double-submitted licenses or license reinstatements after missed renewal periods. Yet the biggest value proposition of AgentSync is that the technology poses Steadily to better execute on its future roadmap.



“I know it must be going well because no one brings up licensing anymore—and they used to make a lot of noise,” said Santomieri.

Tighten onboarding processes, minimize compliance risk, and unlock sustainable growth with AgentSync Manage.

See how AgentSync Manage can benefit your business

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