

- This tech-forward agency chose to future-proof its producer compliance management so manual processes never stand in the way of growth.

## Executive summary

Evertree is a new independent insurance brokerage founded in 2022, when it acquired its first entity, Illinois-based Gnade Insurance Group. Over the last two years, Evertree has continued to acquire some of the top agencies across the U.S. from Virginia to Colorado, leading to increasingly more complex producer licensing and appointment requirements.



With their sights set on powerful organic growth, Evertree's leadership knew they'd need a modern, automated, and streamlined way to achieve producer compliance across all states. Luckily for Max Morelli, Evertree's Compliance Manager and sole compliance staff member, the company discovered AgentSync early in its growth process.

Morelli had been managing producer license compliance for what is formally known as Provision Insurance Group, now the Evertree Bingham Farms location, and he'd been doing it by hand using spreadsheets, NIPR, and state websites. Soon after he joined Evertree's corporate operations, the company invested in AgentSync. It was a decision, Morelli said, that made it possible for him to manage compliance during a time when Evertree expanded from around 80 to 200 licensed producers.

## With the help of AgentSync, Evertree has:



Empowered its solo Compliance Manager to confidently stay on top of around 1400 licenses held by 200+ team members, spanning every state and growing by 100+ this year.



Demonstrated its tech-first mentality by investing in a solution before hitting a crisis point.



Equipped its Compliance Manager with an expert team he can rely on so he's free to focus on Evertree's various other high-priority compliance needs.



If you're on the fence about AgentSync, just do it! Just pull the trigger. You'll be happy you did, especially with AutoPilot. If you're debating about whether to go with AutoPilot or not, it's a total game changer.

MAX MORELLI, COMPLIANCE MANAGER, EVERTREE



## An industry ready for change

Evertree is a new breed of insurance brokerage; one that leads with the recognition that “the insurance industry is ready for change” and puts that belief into practice in everything it does. In an industry known for its aging workforce, ongoing retirement wave, and imminent talent shortage, Evertree's producers average around 30 years old. And, a large portion are joining Evertree as first-time insurance licensees.



We're bringing on a lot of new producers who're getting licensed for the first time, so we've incorporated WebCE into AgentSync, we've made their exam preparation not just easy, but a seamless part of their career path.

MAX MORELLI, COMPLIANCE MANAGER, EVERTREE



This makes for an exciting time at a company that's growing rapidly with a young and hungry producer force. It's safe to say, however, that no one wants excitement in their producer licensing management process. On that front, agency leaders want reliability, safety, and no surprises.

The good news for forward-thinking insurance businesses is that you can have both the innovative environment of a young company and the peace of mind that compliance is buttoned up at all times with AgentSync.

## Investing in the future, right now

When Max Morelli joined Evertree around January of 2023, he'd been managing producer license compliance for Provision Insurance Group. A few months after acquiring Provision Insurance Group, Evertree brought Morelli over to the corporate side to do the same.

Prior to joining Evertree, Morelli explained, he primarily managed producer licenses in the state of Michigan.

"Michigan makes it really easy because producer licenses never expire as long as you get your continuing education done. We only had one person, the agency principal, who was licensed in all 50 states," Morelli said. "I tracked all that on a spreadsheet and I went to the NIPR website and state websites. It was doable, and pretty smooth."

Everything changed when Evertree tasked Morelli with compliance for all producers across all states, particularly as the company was quickly adding new agencies from states as widespread as Virginia to Colorado. It soon became clear to Morelli that staying on top of every producer's license renewals, continuing education, appointment status, and more would be an overwhelming task to keep managing the way he always had.



We're grateful to have discovered AgentSync early on. It's spared us the considerable challenge of manual compliance management and let us focus on growing our entity.

MAX MORELLI, COMPLIANCE MANAGER, EVERTREE



Unlike many insurance organizations that focus on putting out only the most immediate fires, Morelli says Evertree's strong suit is thinking about the future and preparing for it sooner rather than later. Thanks to that mentality, Morelli said, he was fortunate to get help in the form of AgentSync AutoPilot quickly as leadership recognized it wouldn't be possible for him to maintain the status quo. This decision, Morelli said, showed Evertree's focus not just on its immediate growth, but in preparing for years down the road.



Our leaders are visionaries, always planning beyond the present to prepare for a future of success. They recognize the importance of proactive measures to ensure long-term achievement.

MAX MORELLI, COMPLIANCE MANAGER, EVERTREE



## A differentiator in time and producer experience

Once Evertree pulled the trigger on AgentSync, including choosing to go with AutoPilot for a white-glove level of service, it wasn't long before the benefits became apparent. For Morelli, managing producer licenses, renewal, appointments, and continuing education became automated and nearly effortless. Instead of spending his time logging into different state websites and tracking each producer on a spreadsheet, he could focus on a large number of other responsibilities.

With his time freed up from manually tracking producer licensing, Morelli said he focuses on "finding the gaps in carrier appointments, expanding Evertree's carrier footprint, integrating new agencies, and getting them onto new agency management systems," among many other things.

"I honestly don't know how much time and work it would take to do what I'm doing now without AgentSync," Morelli said. "It would be a lot, and require a number of spreadsheets for sure. With AgentSync, I just log in, look at the portal, and I can see when everything is due and stay completely on top of it."

It's not just Morelli's job that's improved as a result of partnering with AgentSync. As Evertree continues to creatively recruit and hire, being able to provide a truly modern and digital experience is a key differentiator for the agency, particularly as it hunts for the next generation of insurance talent. Morelli said Evertree currently brings on about a 60/40 percent split between brand new producers getting licensed for the first time and those with existing licenses.

For those joining Evertree with an insurance license already in place, Morelli said getting them ready to sell at the agency could take as little as an hour: "If I have their name, email, and NPN, they're good to go."

For the brand new producers, Morelli said, having AgentSync allows him to do any back-end work needed once the new hire completes their producer detail record, thus enabling the producer to focus on what their priorities should be, not onboarding paperwork.

## Standout technology with a Salesforce advantage

Evertree is also an outlier among insurance brokerages for its technological know-how. It boasts an in-house technology team who're working on a number of projects to improve internal operations and client experience. When asked what made Evertree decide to partner with AgentSync rather than work on developing its own compliance management technology in-house, Morelli said, "We considered building our own compliance management solution, then we were introduced to AgentSync and abruptly changed course. It exemplified our ethos of excellence so well that we chose partnership over reinvention, acknowledging their brilliant platform as the gold standard in our industry."

As for what made AgentSync stand apart from the competition, Morelli said its Salesforce backbone was very appealing. Although AgentSync doesn't require a company to have Salesforce at all, for those already working in the Salesforce ecosystem, a compliance management platform that integrates seamlessly with it is very attractive to companies like Evertree.

## The best product + the best team

To say that Morelli and Evertree are AgentSync fans would be an understatement. Morelli emphasized the importance of the phenomenal support and customer success teams he's got access to as an AgentSync customer.

And then there's the added benefit of being on AgentSync AutoPilot. Having the AutoPilot team as an extension of Evertree's own licensing compliance department (i.e. Morelli) means he doesn't have to worry about the what-ifs of a producer's status with any state license or carrier appointment.



Our AgentSync Customer Success and AutoPilot teams have been absolutely fantastic! I can't say enough good things about them. They're so responsive whenever I reach out to them. It's an extremely smooth experience and they've made it so easy and manageable from my end. Bottom line, you could have the best system in the world, but if you don't have the team to support you, it doesn't matter.

MAX MORELLI, COMPLIANCE MANAGER, EVERTREE



## How AgentSync helps Evertree

Allows the brokerage to grow both organically and by acquisition as quickly as it wants, without fearing that compliance will end up on the backburner.

Enables a one-person compliance department to manage a 200+ person team with a combined 1400 licenses, and still spend most of his time on higher-value duties than tracking licenses and appointments.

Provides absolute peace of mind that every producer's license status is up-to-date daily, and that potential issues will be flagged and easily visible before they interrupt business.

Makes getting new producers licensed and current producers renewed easy with WebCE integrations for licensing exam preparation and continuing education.

With AgentSync AutoPilot, our compliance experts leverage our best-in-class producer management technology to offer the industry's fastest, most cost-effective, and accurate compliance service.

Discover AgentSync AutoPilot