



# Case Study: Unlocking Real-Time Case Updates with Magnifact's AgentVizion2GO Mobile App

## Overview

In today's fast-paced insurance landscape, agencies and producers require instant access to real-time case information to reduce cycle times and eliminate unnecessary overhead. Magnifact's AgentVizion2GO mobile app brings this efficiency directly to smartphones, offering seamless updates from carriers and enterprise systems, including popular Agency Management Systems (AMS).

By providing real-time notifications, advanced security, and full AMS integration, AgentVizion2GO empowers agencies to streamline their workflows, enhance productivity, and make faster, more informed decisions.

## The Client

**Gen3 Advisor Group**  
www.gen3advisor.com

**Industry**  
Life, Annuities, Health

**Ecosystem**  
70+ carriers, 10,000+ agents

## Key Challenges

- **Delayed Case Updates:** Agencies and producers struggle with inefficient processes and manual tracking of case statuses.
- **Lack of Integration:** Many agency management systems do not provide seamless connectivity with external systems and interfaces.
- **Limited Mobility:** Agents needed a mobile-friendly solution to access real-time data on the go.
- **Security Concerns:** The solution must be secure to protect sensitive insurance data.

## The Solution

**Magnifact rolled out AgentVizion2GO, its powerful mobile app designed for:**

- **Instant Case Updates and Notifications** - Stay informed with alerts on case statuses, missing requirements, suitability approvals, and funding updates.
- **Seamless Integration** - Connect with multiple AMS platforms, carriers, and third-party systems to access real-time updates.
- **Mobile Business Management** - Track and manage cases effortlessly from smartphones, tablets, or web browsers.
- **Robust Security** - Offer worry-free data protection for all users via encryption, HIPAA controls, and SOC 2 Type II process compliance.



## Key Advantages

- **Full AMS Integration** – Seamlessly connects with your enterprise systems, eliminating manual data retrieval.
- **Real-Time Notifications** – Get instant alerts for missing documents, approvals, NIGO issues, and case updates.
- **Seamless Mobile Access** – Agency principals, agents, and financial advisors can access critical data anytime, anywhere.
- **Key Performance Indicators** – Out-of-the-box KPIs to evaluate your agency's performance against goals and strategic objectives.
- **User-Friendly Interface** – Available on iOS, Android, and web browsers for instant accessibility and convenience.

## Testimonials

"AgentVizion2GO has revolutionized how we track and manage cases, providing real-time updates and seamless integration with our Agency Management System. With instant notifications and secure accessibility from anywhere, it has greatly enhanced our efficiency and decision-making process."

— Mac Chrystal, CEO, Gen3 Advisor Group

"I have found the AgentVizion application to be an immense help. It has allowed me to look at all my submitted cases and check for outstanding pending requirements on the go and in the office. It allows for payout tracking to the agents and more streamlined agency management as an administrative person and someone who is in the field speaking to clients. AgentVizion2GO has tremendously streamlined a process that previously took far more time."

— Independent Financial Advisor, Gen3 Advisor Group

Magnifact is a leading provider of SaaS-based DataIntelligent<sup>SM</sup> solutions for the insurance industry, with secure process standards validated by SOC 2 Type II attestation.

To learn more about Magnifact, visit [www.magnifact.com](http://www.magnifact.com)