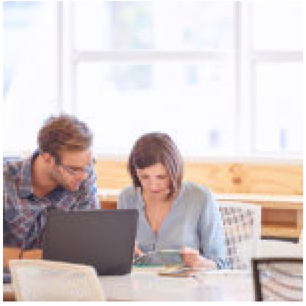

Behind the Scenes: What’s Included in an Eclipse™ Consulting Session

For years, education followed a predictable format. A teacher prepared a single lesson for all students and expected the entire class to follow along.

More commonly, though, modern education emphasizes personalized instruction, where the learning environment is tailored to each individual’s needs, interests, and skills. At Orion, when we deliver platform training to our advisors, we provide best practices based on these real educational principles.

We’ve even hired former educators to join our team and help us build a training environment that scales to meet the unique needs of each user.

One of the ways we create personalized training opportunities is through one-on-one consultations at our two-day Eclipse™ + Communities Summits, which provide training and consultation opportunities on Eclipse™, our trading and rebalancing platform, and Communities, our peer-to-peer model marketplace.

On the second day, we save time for those who are looking to build their expertise and gain advanced insight from our subject matter experts.

In this post, we’ll show you what you can expect from a personal Eclipse™ consultation and why it can be beneficial for your firm.

Who Benefits Most From an Eclipse™ One-on-One?

One-on-one sessions during our Eclipse™ + Communities Summits are intended to answer specific questions for current Orion advisors who are either using our trading tools or preparing to implement them in their firm.

Non-Orion advisors can request one-on-one sessions, but those sessions typically cover more introductory content due to the nature of their usage of Orion.

Why Should Advisors Schedule a One-on-One Session?

The training resources available through Orion Ascent form a great foundation for learning how to use Orion's trading tools, but sometimes there are customizations or firm-specific questions that can only be answered in a more personal setting.

Many of our advisors are new to Eclipse™, so these sessions allow them to dig deeper into the intricacies of the system. Through personalized training, we can help our advisors learn more about how Eclipse™ can create more efficient trading workflows for their firm.

What Do Advisors Need to do to Prepare for a Consultation?

Our one-on-one consultations are entirely advisor-directed, so all an advisor needs to do is bring specific questions about how they can best use Eclipse™ in their firm's daily routine.

A session can consist of detailed training on a particular tool, or it can be as simple as a personalized demo of Eclipse™ using an advisor's firm-specific workflows.

Because it's one-on-one, these personal sessions can cover any number of questions an advisor has about how to put Orion's trading tools to their best use.

How Long Do Consulting Sessions Last?

Each consultation session at the Eclipse™ + Communities Summits is one hour. However, advisors can schedule multiple sessions to focus on different topics during each. One-on-one consultations are offered on both days of our two-day Summits.

How to Join the Next Eclipse™ + Communities Summit

Our next Summit will be held in Seattle, Washington, on July 31 and August 1. We've created three separate learning tracks so you can choose the right path for you:

Non-Orion Advisors: Lunch & Learn
We've built a special introductory course for advisors who aren't yet using Orion.

You'll receive an overview of Orion's portfolio accounting software, learn more about the Orion Communities model marketplace, and discover our new portfolio optimization tool, ASTRO.

Orion Advisors: Eclipse™ Essentials
If you're an Orion advisor who wants to implement Eclipse™ or Communities but hasn't taken steps to begin, this track is for you. Our team will give you a high-level overview of how these tools can positively impact your trading operations.

Orion Advisors: Advanced Training
If you're a current Eclipse™ user, this track gives you the chance to schedule the type of in-depth consulting we covered in this post.

Due to the highly-customized nature of the Advanced Training track, you can use this time to address any categories important to you—from cash buckets, to trade execution best practices, to tax logic and more—so bring everything on your mind to cover with our subject matter experts.

Click here to sign up for the next Eclipse™ + Communities Summit in Seattle on July 31.

Got questions about what we covered in today's post?

Log in to Orion Social to chat with our SME Trading team if you use Orion today, or click here to chat with our sales team if you don't work with us yet.

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