

Ascent 2018 Day 1 Recap: Welcome to Miami Beach



The first day of Ascent 2018 started off with a bang! Not only did we welcome 700+ of the best and brightest professionals in our industry, but we kicked things off with an insightful keynote about going against conventional thinking from Billy Beane, General Manager of the Oakland Athletics baseball organization.

From there, the day's activities only increased as advisors attended numerous educational Breakout Sessions to deepen their knowledge of Orion Connect and how their peers are using the platform to grow their advisory firms.

In the post below, we'll recap the highlights from each of today's keynote speakers. Take a look at some of the fun activities planned for attendees, and find out the one big thing you should take away from day one's training sessions.

Keynote Recap

Conference Welcome

Orion's CEO, Eric Clarke, kicked off Ascent 2018 with a quick look at Orion's development road map, including Reporting enhancements for event-based notifications, Compliance updates focused on the expertise and audit support Orion provides to advisors, and Trading updates, including Orion Managed Accounts.

Eric stressed the theme of this year's conference, "Innovate. Disrupt. Win." Each of the keynote speakers the three days here in Miami will be illustrating how Orion implements this as part of our product development.

We also introduced advisors to this week's education sessions led by our Subject

Matter Experts. In addition to their training sessions, Orion's SMEs will also be consulting with advisors during one-on-one appointments to give personalized answers to attendees specific questions.

Billy Beane

Billy Beane, General Manager of the Oakland A's baseball organization, spoke about the story behind the making of a book and movie, *Moneyball*, documenting his unique approach to assembling a winning baseball team.

Against conventional wisdom, Billy hired staff from outside the baseball world to help provide statistics-based, objective analysis that would enable them to measure a baseball player's value with detailed information.

As a small-market team, the Oakland A's used Billy's unique strategy to compete and win against large-market teams, eventually producing a methodology copied throughout major league baseball.

Joe Duran

Joe Duran of United Capital spoke about the value of the services that financial advisors offer and how creating a great client experience increases that value.

In Joe's view, there are four pillars of client service that every great brand needs to focus on:

1. **Understanding** - Advisors need to personally know the clients and what they care about.
2. **Personal + Interactive** - Clients want an advisor who will be at their side whenever they need them—and that includes being "close" digitally, not geographically.
3. **Predictable + Consistent** - Every client will pay a premium if advisors can deliver a client experience that features repeatability, reliability, and predictability.
4. **Instant Gratification** - It's important to help clients feel good about where they're headed, but financial decisions need to be about the here and now. Joe challenged our advisors to think about what they can do today to make their clients' lives better.

Dean Karnazes

Dean has been called the "Fittest Man on Earth" and it's easy to see why.

Dean spoke about his incredible running history, including running in both the hottest place on earth (Death Valley) and the coldest place on Earth (the South Pole). He also once completed

50 marathons in 50 states in 50 days. We're tired just writing about it!

Throughout his inspiring and oftentimes funny keynote, Dean inspired our advisors to, in his words, "question conventional thinking and move beyond self-constructed limitations we place on ourselves."

The One Thing You Should Know:

Here's your quick start guide to using the new Supervise dashboard in the compliance-focused Compass app:

Here's your #Ascent2018 quick start to using 'Supervise!'
pic.twitter.com/Fneiak8rWv

— Orion WealthTech (@orionwealthtech) September 5, 2018

In Case You Missed It

Our Fuse 2018 event also kicked off, where 100+ of the best fintech developers and programmers will gather to build new integrations and technology experiences as part of our first ever "Tech's Got Talent" competition. Learn more [here](#).

Something Fun

Orion's Billing Manager, Rodney Mottl, got us off to an interesting start in the Conference Welcome by writing (and singing) a song about the "billing blues" for our advisors. Also, he came dressed as Elvis.

Watch a video of Rodney's song recorded by one of our Fuse 2018 judges, Min Zhang:

Hilarious "Billing" Blues! #Ascent2018 now I'm inspired to make a rap about all

*kinds of user pain points lol - billing definitely came up a bunch in a recent survey we did. @orionadvisor #fintech @United_Capital
pic.twitter.com/1yS6CGLwfC*

— Min @DreamlanderArt (@DreamlanderArt) September 5, 2018

We'll be sharing a rewind blog that highlights the biggest moments from each day of Ascent 2018, so be sure to check back tomorrow and Friday for new updates.

Don't work with us yet? Make sure you're at Ascent 2019. Click [here](#) to speak with our sales team to see how Orion's portfolio accounting solutions can support your firm.