Connecting Marketing with Financial Planning to Create a Consistent Client Experience

Imagine this scenario: your firm wants to expand its retirement planning business. As an Orion client, you have access to Market*r and its depth of collateral specifically built around retirement planning.

First, within Market*r, you set up your firm's profile to include your logo, social media links, and contact information. This way, it will automatically populate in whatever campaign you choose.

Next, you open the Orion Planning platform. From the self-registration tab, you choose the retirement planning theme that best fits your firm's look and feel.

After you customize the pre-built, professionally designed assets with your brand's specific messaging, you schedule the campaign to deploy.

Your initial work is done. But your prospects are just getting started.

As your campaign hits email inboxes and social platforms, your target audience begins engaging with your assets. Because you've set up the campaign to automatically deploy, one action—say, a whitepaper download—triggers the next, so that your prospects are being consistently nurtured through the buyer's journey.

One prospect in particular—let's call her Jane—is particularly inspired by the messaging. She's never worked with a financial advisor before, but is beginning to think about doing more to plan for retirement than contribute to a 401(k). And because Market*r's assets are directly connected with the Orion Planning platform, Jane can start a self-guided planning workflow right from the campaign call-to-action, or CTA.

As she fills out her workflow—identifying goals, connecting accounts, and viewing success projections—you can see her contact information, date of workflow completion, total income, and total assets populate right in your leads dashboard.

From there, you can decide whether or not to contact Jane directly, add her to a follow-up email campaign, or, through a deep integration with Orion's redesigned advisor portal, build an investment proposal using the specific details Jane has provided to execute on her planning goal.

The Importance of Financial Planning Connectivity

When we created Market*r, we knew it wasn't enough to design a robust library of professional marketing assets. It wasn't even enough to build the technology to schedule, distribute, and manage those assets.

To truly help advisors grow their financial planning businesses in a scalable, sustainable way, we needed to bring the client experience full circle.

That meant making our campaigns customizable, so your firm's messaging, voice, and value propositions remained cohesive and accessible.

It meant connecting your leads to the planning platform through strong CTAs, empowering them to register and start filling out their own goals through intuitive, self-guided workflows.

It meant designing a lead-tracking dashboard that gives you the ability to easily follow up on new opportunities, keeping prospects and interested clients fully engaged.

It meant a deep integration with the Orion advisor portal, allowing you to generate investment proposals based on the goals and account details provided by interested prospects.

From campaign execution to financial planning to investment proposal to account opening, Market*r gives you the power to see, measure, and manage the full prospect-to-client lifecycle—which also creates a consistent client experience.

Ready to put Market*r’s robust campaign assets, best-in-class execution technology, and deep integrations to work for you? Request your personalized demo here!

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