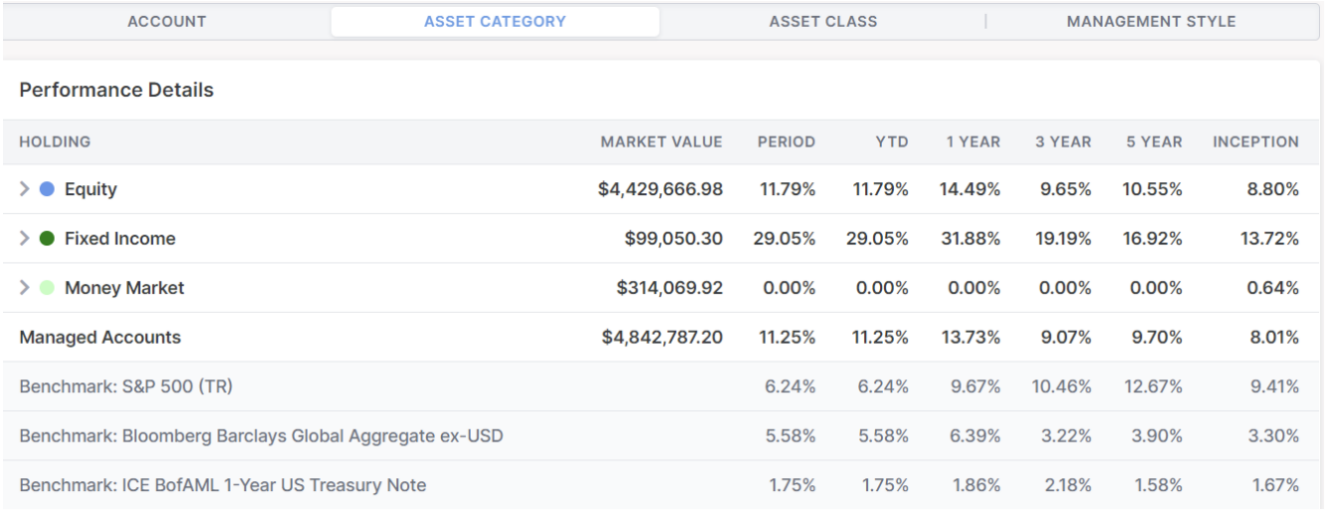
Customize Your Client's Experience with Performance Drilldown

Looking for ways to enhance your client experience and engagement? Look no further than our latest release in Orion's New Client Portal: performance drilldown! The highly anticipated feature allows you to have more control over how you present performance metrics to your clients, helping to foster effective conversations and promote engagement. To access this feature, you will need to be in Orion's new Client Portal, navigate to "Personal Finances," and click on the "Performance" tab.

What is it?

Performance drilldown gives you the flexibility to show what is most important to your client. Performance can be displayed for multiple periods of your choice, and you can choose what level of performance to display, whether that be at the asset category level, asset class level, individual asset level or something else. Additionally, you can opt to display benchmarks in the chart and also select a default performance group to show when the client lands on the page.



HOLDING	MARKET VALUE	PERIOD	YTD	1 YEAR	3 YEAR	5 YEAR	INCEPTION
Equity	$4,429,666.98	11.79%	11.79%	14.49%	9.65%	10.55%	8.80%
Fixed Income	$99,050.30	29.05%	29.05%	31.88%	19.19%	16.92%	13.72%
Money Market	$314,069.92	0.00%	0.00%	0.00%	0.00%	0.00%	0.64%
Managed Accounts	$4,842,787.20	11.25%	11.25%	13.73%	9.07%	9.70%	8.01%
Benchmark: S&P 500 (TR)		6.24%	6.24%	9.67%	10.46%	12.67%	9.41%
Benchmark: Bloomberg Barclays Global Aggregate ex-USD		5.58%	5.58%	6.39%	3.22%	3.90%	3.30%
Benchmark: ICE BofAML 1-Year US Treasury Note		1.75%	1.75%	1.86%	2.18%	1.58%	1.67%

The opportunities are endless when it comes to performance drilldown, and with so many choices and options, we wanted to share a few tips on the best way to leverage this feature.

Keep it Simple with Performance Periods

There are 8 different performance periods to choose from, but it's best to only display a handful at one time to avoid overwhelming the client with too much information. When focusing on long-term investing with your clients it may be beneficial to display periods such as 5 year, 10 year, and since inception instead of only showing shorter term periods like month to date, quarter to date, and year to date. Focus on displaying periods that allow your clients to fully understand how their accounts are performing overall.

Here's What's Popular Among the Grouping Options

Some of our most popular grouping options include account, asset category, asset class, and management style level. You can also select a default grouping that the client will see when they first land on the page. Choose a group that the client will be most familiar with and will want to see on a regular basis such as asset class or asset category. You can choose from a total of 9 different groups to display, but typically displaying 3-4 at a time is effective for most clients. Most firms choose to display performance down to the asset level under each of these groups but you do have the flexibility to turn off asset level performance if you'd like.

Benchmarks Are Your Friend

If benchmarks are an important part of the conversation with your clients when

discussing performance you can choose to display them at two different levels. They can be shown both at the household level at the bottom of the chart and also directly below a group when the group is expanded. Displaying it at the group level can be a great option for more analytical clients who like to go through each group and compare their performance with the benchmark.

Ready to get started? Log in to the new Client Portal, navigate to “Personal Finances,” and click on the “Performance” tab.

Not working in our new Client Portal yet? Get Started Here.

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