

# In Times of Turmoil, Deliver for Your Clients Digitally



The first reaction for most was to ask, “when can we get back to business as usual?” The further we get into the pandemic, the more we’ve all come to realize, we may never go back to what we took as “normal” before this crisis.

Luckily, Orion clients are still able to deliver to their own book of business through a host of digital offerings that were designed for efficiency, but have seemingly become essential over the last few months.

Let’s do a thought exercise in which Anthony, an Orion advisor, takes what would be a standard client meeting but capitalizes on Orion’s dynamic digital solutions to deliver a comprehensive workflow to enhance their client’s experience.

## **The Meeting**

Anthony is located in Pennsylvania, a state in which the governor has issued a stay-at-home order for non-essential business. Unfortunately, that meant no meeting with clients face-to-face, which Anthony typically enjoys doing.

Instead, Anthony schedules a meeting with his client, Carmella, through Orion’s integration with Glia, which includes a co-browse function. That enables them to go through Carmella’s quarterly reports together, right in her client portal, with audio and video chat as needed. Anthony can take the reins and take Carmella exactly where she needs to be in the portal to see the most up-to-date performance data.



Both Anthony and Carmella agree that it has been a pleasant experience running through her portfolio right in Orion's technology and make plans to do it this way in the future, saving Carmella a 40 minute drive to Anthony's office.

## **The Plan**

While on the call together, Anthony re-iterates to Carmella the importance of having a defined financial plan in place. Things like goals, action steps and estate planning are critical to good financial wellness.

Carmella, with the world around her weighing on her mind, bites. She has known she needed a robust financial plan, but there's no better time than now to document it and have defined actions for the future. Anthony agrees, and starts the process of setting Carmella up in Orion Planning.

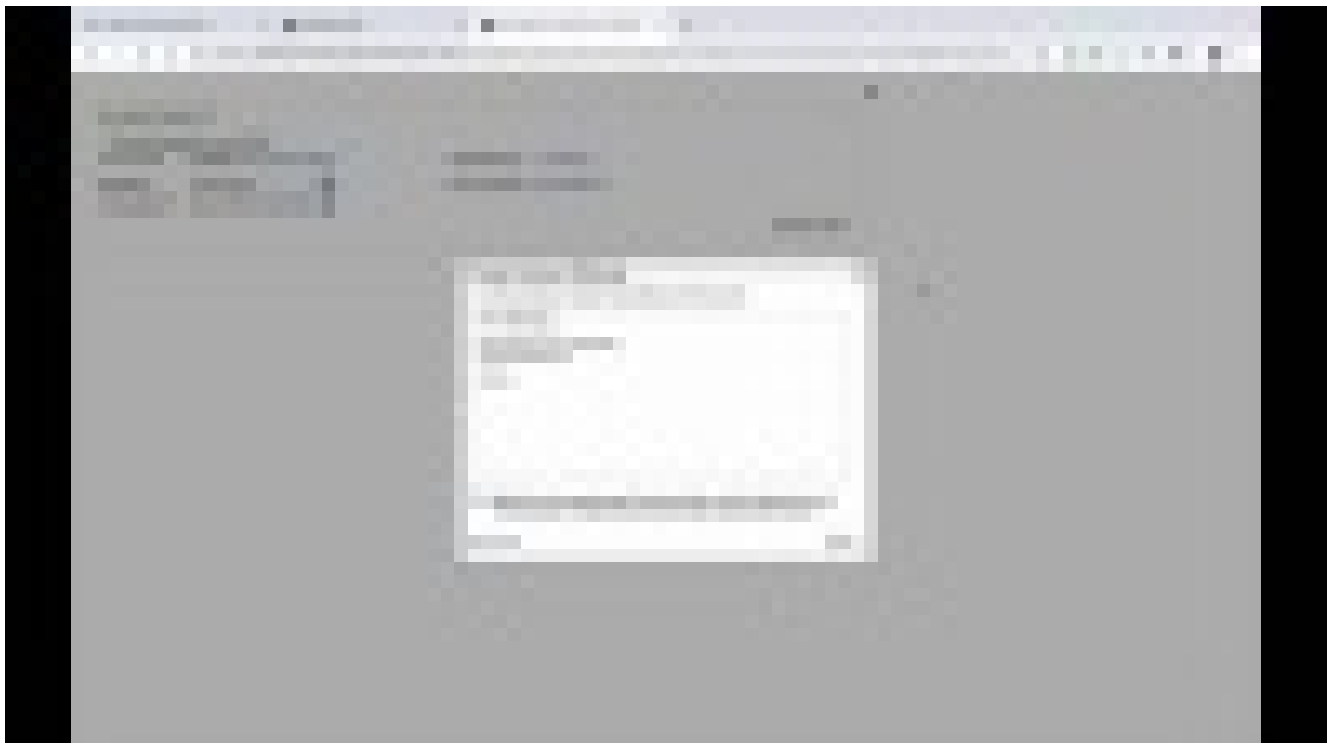
## **The Takeaways**

With a financial plan in the works, Carmella is generally happy with where she stands financially, but does think there's more she could be doing. With Anthony's guidance, Carmella decides she wants to open an investment account with Schwab. Somewhere else, this might require serious toggling for Anthony, or even worse, hard copy paperwork.

Because Anthony is an Orion advisor, he can go right to his new account center to open up a new Schwab account for Carmella, complete with documents being sent digitally for signatures.



And if Anthony ever wanted a relationship with a different custodian, for whatever reason, he rests easy knowing that Orion provides this level of dedication to digital across the board.



by **James**

## TD Ameritrade Digital Account Opening

## **The Follow-Ups**

After Anthony successfully fulfills the plan for Carmella's new accounts and sets her up in Orion Planning, he wants to make sure he is in contact with her and ensure she is inputting info into Orion Planning correctly and filling out goals and action steps.

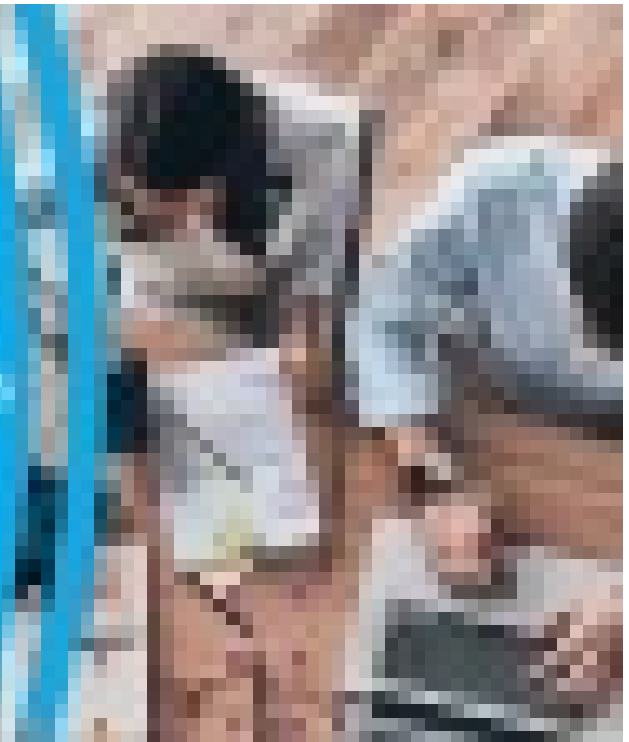
Following their meeting, Anthony puts Carmella into an Orion Market\*r workflow. He chooses the bold style, drawing on the funny and witty banter they always seem to have during meetings. Through Market\*r, Anthony can send Carmella targeted and personalized content about the importance of financial planning, which is exactly what he does.

11th Edition

Learning Marketing  
Concepts in Action  
Financial Planning: Investments

Learning Objectives

- Identify the marketing concepts in action
- Apply the marketing concepts in action
- Analyze the marketing concepts in action





When it's all said and done, Anthony has re-engaged with a client through marketing activity, virtually met with his client, set her up in Orion Planning, opened an account for her, and followed up with engaging marketing materials and added value to not only Carmella's financial life, but deepened his own book of business. And it was all done digitally through Orion's suite of technology.

*Interested In Applying This Workflow For Your Firm?*

Current Orion users: Contact [info@orionadvisor.com](mailto:info@orionadvisor.com) or 888.695.0523

Not already using Orion? Contact [empower@orionadvisor.com](mailto:empower@orionadvisor.com) or 402.496.3513

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