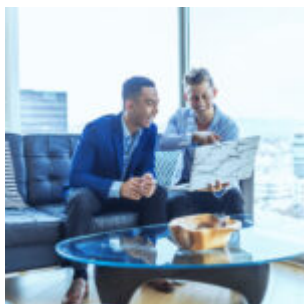


# How Model Management Fuels Client Retention and Firm Growth



*This blog is based on the second installment of our Help You Sell webinar series. Want to delve more deeply into client retention strategies for financial advisors? Watch the full webinar [here](#).*

When Vanguard-Spectrem surveyed 3,000 investors about the reasons they'd leave their current advisor, their top three answers were:

1. Slow response time to calls or emails.
2. A lack of good ideas or advice.
3. No proactivity in advisor outreach.

In short, investors are looking for thoughtful, attentive service. That's easier said than done when you have a full roster of clients and countless back-office tasks to juggle alongside client-facing ones.

But there's a real business risk in missing the mark on client communications. When investors leave your firm, you need to continue to win new business just to tread water. Growth can only happen when you're retaining all of your current clients while also adding new ones.

So what can you do to drive retention?

It's all about streamlining processes so you have more time to invest in those valuable client touchpoints. And technology can help with that.

Let's explore how Orion Risk Intelligence and its integration with Orion's trading platform, Eclipse, can give advisors time back for client engagements and bring

more value to those interactions.

## Simplify Your Model Management

When you can reduce your manual workload, you free up time to engage with clients. Risk Intelligence allows you to streamline and automate the model management process using three key features.

The **model optimizer** tool allows you to adjust the risk score of the model, and the system will automatically shift allocations within the portfolio to reach the desired score.

The **interactive editor** gives you the power to edit a model freehand. Swap out securities or add new ones, making as many adjustments as you'd like before finalizing.

The **blend models and funds** tool makes it easy to swap out securities for SMAs, fixed income, or other individual securities.

All of these features are designed to streamline and simplify the model management process. When you reduce the amount of time you have to invest in back-office tasks, you have more time to invest in proactive client updates.

## Evaluate Adjustments with Stress Testing Scenarios

Utilizing the Risk Intelligence stress testing feature can help you showcase your fiduciary value and can give your clients the confidence to move forward with new strategies.

Once you've made adjustments with your model management tools, you can run the new model through dozens of stress-testing scenarios based on real-world macro risks.

Undertake these stress tests in advance to see how the model performs before finalizing any changes. Stress testing can provide you and your team valuable

insights that make it easier for you to confidently execute on changes to your models.

You can also share this information with clients. Instead of simply stating that you've changed some of their allocations or holdings, you can provide data on hypothetical performance to show why you made those adjustments.

Run the original model and new model through stress testing side-by-side to show clients how hypothetical performance improves in a given scenario. Offering up this information makes for a richer, more nuanced client touchpoint where you can share your rationale and discuss potential upside and downside in greater depth.

## **Create Fuel for Proactive Client Touchpoints**

As you now know, clients don't just want to speak with you regularly. They want to hear from you proactively, and they want you to show up to those check-ins with ideas and suggestions.

Orion Risk Intelligence helps you showcase your fiduciary expertise. The model management tools make it easier for you to take a proactive role in adjusting strategy to meet the current macro moment. Stress testing gives you the data to support your new approach.

Taken together, Risk Intelligence gives you the tools you need to show your work with clients. You arrive at client meetings with clear, future-focused data that supports your strategy and allows you to undertake the kind of behavioral coaching and rebalancing that result in advisor alpha.

When it comes to growing your firm, maintaining and strengthening existing client relationships play a big role in your continued success. Tools that enable proactive, forward-thinking action can help you create a better client experience and fuel your long-term growth.

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