Five Ways the Orion Client Portal Will Transform Your Client Relationships

At Orion, everything we do is designed to further our mission: to power the advisor-client journey with a tech-enabled fiduciary process that enables advisors to:

- Seamlessly attract new clients
- Connect planning goals to investment strategies
- Help investors achieve their unique definition of success

In looking at our own client experience tools, we saw room for improvement—specifically surrounding our client portals.

Traditionally, client portals have seen login fatigue and low adoption rates, which is a big problem if you're an advisor trying to engage your clients. Especially now, when face-to-face client meetings may not be possible, it's critical to find a way to encourage your clients to interact with your business. In fact, the pandemic has been a catalyst for investors to begin accessing their financial information—at Orion, we saw a 20% higher login rate during the pandemic months compared to the same time frame in 2019.

To help address that need while empowering our advisors to strengthen their relationships and create a smoother financial management journey for their clients, we took a look at our own portal offerings: our legacy portal and our Orion Planning portal.

And we thought: instead of two good portals, why not one incredible portal?

From there, we set out to create a client portal with as much functionality as possible delivered in the most elegant way possible. A portal that contained all aspects of financial management, married investment performance with financial planning details, and made collaboration between advisors and clients simple and seamless.

We created the single Orion Client Portal, a client engagement tool like nothing else available: the industry’s only true personal financial management experience.

Here are five ways our new client portal will help you attract, engage, and delight your clients:

1. It Shows Them Everything They Need in One Place

Typically, investors have to check one portal for financial planning information, another portal (or several!) for account balances, and still another portal for investment performance data—not to mention checking their credit scores.

Within the new Orion client portal, your clients can access all of that information in a single place. They can view their accounts, their financial plans, their investment performance—even their credit score—without having to log in multiple places. They can even drill down into investment performance at the aggregate or account levels, accessing details such as purchase date, cost basis, and holding period, as well as helpful tax planning data like realized and unrealized gains.

2. It Empowers Them to Take Action

Accessing their financial picture is just the beginning. The new client portal also gives investors the ability to take control of their financial lives—with your guidance, of course! Within the portal, you can create action items and assign them to your clients, including due dates. As your clients complete these items, they can check them off—but what they’ve accomplished will still appear in the portal, creating a kind of progress roadmap.

And what if one of those action items is to open a new account? Clients can do so right from the portal within minutes, thanks to our integration with Apex Clearing.

3. It Won’t Overwhelm Them

One of the roadblocks to client portal adoption has been that there are simply *too many* portals. And when it comes to financial information, more isn't always better. Sure, you want your clients to have access to everything they need to see their full financial picture. But what you don't want is to overwhelm them with information that isn't relevant, or is too technical and complicated.

You control what your clients see in the new portal. If you want, you can give them access to everything: workflows, performance reporting, transactions, the ability to edit their profile and create What If scenarios, and more. But you can also limit their access to just what you feel is relevant and helpful to them. What's more, you can limit their access during the prospecting stage, then grant more complete access after they become clients.

4. It Empowers Effortless Communication and Collaboration

In a world where consumers are used to being able to get exactly what they need with the push of a button, any friction within their investment management relationship is going to stand out—and not in a good way. So we've eliminated it.

Within the new client portal, co-browsing capabilities allow you to see exactly what your client is looking at. You can also take control of the mouse and help them navigate, driving a better portal experience for clients who may not be as tech-savvy as others. What's more, using Calendly, clients can set up meetings with you with just a few clicks. They can also choose to send you a message within the portal, which you will receive via email. Finally, the Document Vault allows both you and your clients to share important information with each other in a secure way.

5. It Creates a Cohesive Brand Experience

When your clients use your client portal to access their entire financial universe, guess what? You're the center of that universe. And that's exactly what you want. When they set new goals, they'll think of you as the one to help make them a reality. When they see that they're on track to retire thanks to your investment strategy, that only solidifies your value. When they open a timely piece of market commentary you've shared with them, that only strengthens your connection.

To drive that cohesive, relationship-building experience home, the Orion client portal is fully branded with your firm's colors and logo, as well as your photo.

That way, when your clients think about their financial lives, they also think of you.

Ready to get started improving your client relationships with the new Orion Client Portal? Click here to contact our support team and get started!

Not working with Orion yet? Let’s change that! Schedule a demo with our team today!

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