

Four Best Practices for Personalizing Your Event-Based Notifications



In today's noisy, crowded industry, advisors are constantly looking for ways to stand out. And with the rise of robo-advisors, indexing, and ETFs, investment selection is no longer the sole answer.

Client experience is. According to a Global Investor Survey conducted by Dimensional, investors named *peace of mind* and *knowledge of their financial situations* as the top two ways they measure advisor value.

Connecting security and transparency for your clients begins with personalization. Your clients want to feel heard, and they want to feel special. Delivering tailor-made communications specific to their needs gives them the client experience they're looking for while also helping you stand out from your competitors.

Orion's Event-Based Notifications give you the ability to curate the ultimate personalized client experience. Our new communication feature automates the creation and delivery of text and email notifications, so your clients receive relevant, up-to-the-minute information based on different event triggers.

Need a quick refresher on Event-Based Notifications? Check out our highlights blog [here](#).

Taking Your Client Communication to the Next Level

Here are four tips for making the most of our Event-Based Notifications tool:

1. Get to Know Your Clients: Before you can personalize their communication

experience, you need to understand what they want from you as an advisor. Find out what kind of information they consider need-to-know: is it performance increases or model changes, or an update when you've rebalanced their portfolio? Would they respond well to messages celebrating birthdays and milestones? Do they prefer email notifications or text messages?

Event-Based Notifications offer a strategic way to demonstrate your willingness to improve your communication style to fit your clients' needs, but only if you understand what their needs are.

2. Understand Their Limits: Make sure your clients are aware of the notifications they've agreed to receive, and explain that they can opt out of those notifications at any time. Additionally, keep time zones in mind to avoid sending communications during off-hours, where they'll likely be missed (or cause unnecessary aggravation).

3. Get to the Point: Notifications are meant to be short and sweet, so be clear and concise. Don't waste your clients' valuable time with unnecessary details. And make sure to deliver the information they need in simple language, not industry jargon that may not mean anything to them.

4. Stay Engaged: Consistent communication is a great way to strengthen trust and develop a real rapport with your clients. Event-Based Notifications go a long way toward helping you do that, but don't forget the importance of in-person meetings and ad hoc calls, if it's what your client needs. Take a holistic approach to delivering a best-in-class client experience, and your clients will reward you with their continued loyalty.

Want to learn more about the benefits of personalizing Event-Based Notifications for your clients? Check out our on-demand webinar.

Don't work with us yet? Let's talk about how you can leverage Event-Based Notifications and our other great features today!

