# 5 Ways Orion Can Support Your Growth in Becoming a Billion-Dollar Firm



The larger your firm grows, the more important it becomes to ensure you have an efficient operations team that can scale as you add more clients.

There's only so much productivity that each employee can give your firm, and as a result, adding technology that can enhance their ability to focus on their work and complete tasks faster is often the best route for large RIA firms as they continue to grow.

Creating operational efficiency should be the underlying concern when a firm of any size looks to add new solutions to their technology stack. When you look at your firm's current technology solutions, does it hit this mark?

Here at Orion, we understand this critical need, so that's why we're focused on helping you create a more scalable and growth-oriented firm. In this post we'll outline how our technology does just that.

## 1. An Unequaled Service Structure

Support comes from Orion, whichever way your firm needs it.

We offer large firms a dedicated Advisor Success Advocate and added support from a Strategic Consultant. The Advocate is there for everyday issues, while the Consultant's role is to identify ways firms can maximize their use of the Orion platform.

Orion service extends beyond these roles. Even our programming department

adopts a service and support mentality by creating custom development that helps firms leverage new or streamlined workflows. And going even deeper than programming is our IT department. Orion is SSAE 16 audited and ISO 27001 certified, which means we've put our internal processes and data controls to the test.

# 2. Mergers & Acquisitions Support

With the amount of M&A activity in our industry, feeling support from your tech partner should be more than just knowing that you have someone to call when you have a question about building a new custom report.

Working with your firm's technology providers to support this type of firm change and growth can be critical to your success. Here at Orion, we can support your M&A activity with dedicated conversion specialists who help onboard new data quickly and correctly.

But our support for M&A doesn't stop there. Those new team members you're bringing into your firm need to understand how Orion impacts them, and our Ascent e-learning platform offers the tools to make sure they can get up to speed quickly.

# 3. Increased Confidence Through Compliance

Improved trading, billing, and reporting capabilities are one of the core reasons large and growing firms choose Orion. But increasingly, they're also choosing Orion because of our robust (and ever-expanding) compliance features.

For ease of use, most advisory firms want to maintain their employees' financial accounts in the same platform as the rest of their clients' accounts. However, it's important in that situation to keep those accounts hidden from other employees who might be using the platform for their day-to-day tasks.

Orion's software management capabilities allow firms to establish robust user roles so your firm can centralize your data, while also maintaining strict guidelines for supervision and compliance workflows.

# 4. One Solution for All Your Teams

At an institutional level, there can easily be software redundancy from one department to the next. Your compliance team may be paying for one tool to accomplish their tasks, while your trading team may be using a trading-centric tool to complete their work.

In this situation, both systems are using the same data, but multiple solutions means the data is not centralized and likely not time-efficient. It's certainly not cost-efficient to the bottom line.

That data that's being spread across multiple tools is centrally located in the Orion portfolio management platform. And because Orion provides compliance and trading solutions, your team can use one application across teams to ensure that the same quality data is accessible to everyone.

# 5. Data Resources for Custom Solutions

The industry's ten largest firms who also just happen to work with Orion use some kind of proprietary software solution that is supported by data reconciled and stored in their Orion database.

Our approach to integration has always been to be transparent and open with our technology partners, and we offer our clients that same level of accessibility. Every advisor who uses Orion can access our open API environment to enhance their firm's needs with normalized data that can be easily pulled into their proprietary systems.

If your firm is growing to a size where you require more specialized data services and support, Orion has carefully and thoughtfully created the infrastructure you need to scale your operations. If you don't work with us yet, click here to get in touch with us and begin discussing how we can meet your specific technology needs.

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