

How We're Enhancing Your Orion Communication Experience



Great technology is often accompanied by great service. In fact, it's hard to have technology that users feel good about if it's not partnered with someone friendly and helpful when support is needed.

When you choose Orion, you're not only selecting best-in-class reporting, billing, trading, and client experience technology solutions, you're also getting access to our award winning support staff.

In this article I'm going to show you how we're using technology to enhance our support and make the Orion platform more robust and easier to use. Our newest service offering, available today, connects you with Orion SME teams for faster, simpler support with enhanced phone system and online chat solutions.

New Ways to Engage

About a year ago, we implemented online, in-app chat as an additional way for advisors to get in touch with our service team. Up until that point, support was provided by phone or email, however we know it was important to keep up with the latest trends, including online chat, and meet the needs of our advisors with service and collaboration opportunities in more places.

And guess what? Online chat has been a huge success! Since we rolled out the feature, our support team members have taken over 42,000 total conversations with advisors. In many cases, those conversations have answered a quick question in minutes, saving advisors a lot of valuable time.

In total, we now receive 13% of our initial interactions via chat, and have seen a

15% overall reduction in email cases over the last year, even as Orion has grown.

But we didn't want to stop there; the popularity of live online chat got us thinking of more ways to make the service experience even better—so we've updated our online support features to give you more control over how and when you connect with us.

Here's how:

Wait Less

When you click on *Contact Us* in the Orion Connect navigation menu, you'll now see a status indicator to tell you which team are available to take your chat at that time. A blue chat bubble means someone will be right with you, while a gray message icon means the team is busy assisting another advisor, and will be available shortly. If the team you want is tied up, you can **now leave your message for them directly within Orion Connect**, instead having to navigate away to your email to send the message that way.



Talk More

We've also expanded the way you can initiate a conversation online. When you select a team, you won't be taken directly to chat. Instead, you can choose to talk with us by **computer audio**, **phone**, or **chat**. Select the option you want, and your support request will begin!

If you choose to talk by phone, a number-pad will pop up so you can dial through your phone to speak with our team. You'll also see the chat window when the engagement starts so sharing information is easy.

If you start with a chat and the question gets too complicated, you can now **upgrade your chat** to speak with the SME team through computer audio or phone to seamlessly continue your conversation.

Work Together

But the best part about our support enhancements may be the new **co-browsing** option, a feature we have been using for the last few months with our Orion Connect integration with Salesforce.

Co-browsing enables your Orion support contact to more quickly troubleshoot your questions by viewing your Orion Connect screen, and navigating that screen with you. But not to worry—our team won't be able to see any other part of your computer screen, and a co-browsing session only begins when you initiate it or accept the invitation from our support team.

User Tip: *Review all advisor level roles in the Manage Users app and enable the chat buttons for everyone at your firm who contacts Orion. Go to Manage Users > Roles > Privileges > Advanced > Resource. You will want to enable all chat buttons to have access to all SME teams.*

You can get started with our new online support options right now. Each feature described in today's post is available when you log into Orion Connect. We look forward to chatting with you!

Not yet an Orion client? Contact our team for a demo of the Orion platform to see how your team can benefit from a technology company built on a foundation of service.

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