

Making a Market*er: Orion's Brand New Marketing Solution Is Here



As we deal with the effects of COVID-19 and its inevitable aftermath, you have the unique opportunity to use this time to prove your value to your clients—by helping to mitigate some of the uncertainty and panic they're surely feeling as they watch the market fluctuate wildly from day to day.

In these tumultuous times, financial planning is now more important than ever.

Financial planning does more than put your clients' goals at the center of your relationship—it grounds your clients in the long-term objectives that will help guide their actions during times when it may be tempting to succumb to short-term hysteria.

And financial planning offers extraordinary benefits to advisors, as well: strengthening client relationships and loyalty, increasing the likelihood of referrals, and improving portfolio outcomes overall.

But it's not enough to simply offer a financial planning service. You need to get the word out—both to your clients and to new investors who are seeking guidance and advice for the first time—that you have the resources to address their financial uncertainties.

And though there are advisor-specific marketing platforms available, they're missing a critical step: a deep connection to the financial planning process.

Our Integrated Approach to Your Challenge

So we leveraged our own team of over 25 marketing experts to define the best practices that would guide the development of a platform that worked

differently—a platform that addressed those deficiencies and turned them into opportunities.

When it comes to marketing best practices, we know that:

- **Data drives good decisions:** Not connecting marketing performance to real sales opportunities wastes advisor time and resources.
- **The advisor value prop is critical:** But many outsourced services only allow for the minimal personalization of extremely generic content.
- **Creative, unique content wins:** But developing those truly differentiating marketing materials can be expensive, time-consuming, and difficult to execute.
- **There is a formula for execution:** It may not be rocket science, but there *is* a right way to execute marketing in our modern era, and many advisors haven't fully tapped its potential.
- **You can't substitute experience:** It takes trial and error to truly understand what works most effectively. Access to someone more experienced than you will always improve your outcome.

We combined our marketing expertise with our knowledge of financial planning to create a true differentiator: the industry's only marketing solution designed specifically to drive business growth through financial planning.

Introducing Orion's Latest Product Offering: Markt*r

Markt*r combines hyper-personalized content campaigns with top-of-mind planning topics, best-in-class marketing execution technology, and interactive goals-based workflows.

Our full-service solution is built to help you both increase client engagement *and* fill your funnel with more qualified prospecting opportunities.

Customizable Content Meets Seamless Connectivity

The entire Markt*r experience begins with our content—which is unique, dynamic, and completely customizable. Canned content built around tired financial planning topics won't do anything to drive growth—but messaging that speaks to investors' personal goals, needs, and challenges will. We'll continue creating new campaigns on a monthly basis, and we've even set up a feedback

section of the platform, where you can suggest future campaign tracks you'd like to see.

And with its planning-centric approach to growth, Market*r creates a cohesive experience for your end users by driving them directly through your financial planning workflows with clear and direct call-to-action buttons. As they build out their financial plans, that information will populate right in your Orion Planning dashboard.

For you, the advisor, that means a simplified tech stack—not one more app to keep track of. Your marketing data is fully connected to the tools you use every single day, empowering you to run your advisory firm as you always have, while building a continuous pipeline of growth and opportunity.

*Ready to see Market*r in action? [Click here to request a personalized demo!](#)*

A Tiered Approach Helps Meet Your Unique Needs

We know not every advisory firm needs a full-blown marketing concierge program—but we also know that some do. So as we built Market*r, we considered the different marketing goals and challenges of the 120+ advisory firms we surveyed.

The result? Three unique levels of marketing service, organized into tiers by capabilities, access, and pricing.

Tier One: Customizable Campaigns

Tier One is ideal for advisors who already use a marketing technology, but are looking for additional creative campaign content to better support their financial planning services. You'll have the ability to customize any content you want, along with the flexibility to disseminate it using technology you're already familiar with.

Tier Two: A Full-Service Solution

Tier Two offers full access to not only the creative campaigns, but also the technology used to deploy them. You'll have all the tools and intelligence you need to reach key audiences, mobilize collateral, and run targeted campaigns, as well as seamless connectivity to your financial planning dashboard. The workflows will guide end recipients through the process of creating a financial

plan, and send the leads directly to the advisor.

What's more, you'll be able to track the performance of all campaign content, as well as view the leads and opportunities created in the leads dashboard.

Tier Three: Marketing Concierge

Tier Three includes everything you'll find in Tier Two, with the addition of access to marketing service and support from Orion's marketing team. Our areas of expertise include marketing strategy, copywriting, web development, branding and design, and digital/social media marketing. We'll create a custom marketing plan for your firm, and you'll also receive five hours of execution or consultation per month.

How to Get Started

To ensure that every firm who wants to participate receives the highest level of marketing service, we're rolling out our Market*r platform in waves. If you're interested, [click here to sign up!](#)

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