

New Virtual Assistant Chat Bot Helps Orion Provide Out-of-This-World Client Experience



Calling into support for help and instead getting passed around like a hot potato is so frustrating.

At Orion, we're committed to making our advisors' lives easier, including getting you quick, helpful answers from our best and brightest when you need them. A game of telephone is not part of that process.

So, we've launched the beta version of our new chatbot to help get you directed to the right team right away. Naturally, we've named this virtual assistant after the brightest star in the Orion constellation.

Meet Rigel.

As his British-sounding name suggests, Rigel (pronounced "Rye-gel") is cordial, prompt, and completely at your service. Think of him as your own personal Orion butler ushering you toward the answers to your burning platform and subject matter questions.

Where Did Rigel Come From?

Rigel was born out of a bang-of-an-idea from our savvy Platform Support team. The team recognized that many of our advisors were calling Platform Support when they were not sure which of our Subject Matter Expert (SME) Teams could best handle their questions.

Of course, our Platform Support team is always ready to help. However, we were

having to transfer advisors at a high rate. To eliminate the frustration that comes from being transferred from team-to-team, we created Rigel.

Rigel does not replace our valuable, human team members. He simply helps create a better experience for our advisors by getting them pointed in the right direction right away. And, at the same time, our human team members are able to turn their focus to the technology they support.

Does Rigel Actually Work?

No one wants to be stuck in a loop talking to a bot when all you really want is to speak with a human. So Rigel's responses are being monitored by one of our human team members to train him and make sure your experience is as effortless as possible.

Like any shining star, Rigel was very accurate out of the gate and gets smarter as we monitor and make small tweaks along the way.

So far, Rigel is proving popular and effective. In the first week Rigel was introduced, there was a 30 percent reduction in transfers from Platform Support to other teams.

How Do I Use Rigel?

To find the real Rigel, point your telescope at the right foot of Orion in the nighttime skies. To ensure you can find our Rigel, ask the advisor admin at your firm to grant you access.

To manage access to Rigel for your users, navigate to: Manage Users > Edit Role > Privileges > Advanced > Resource > Enable Chat Platform Support

Firm - Portfolio Manager (35) for Advisor CLOSE

General
Role Information

Privileges
Apps
Records
Actions
Advanced

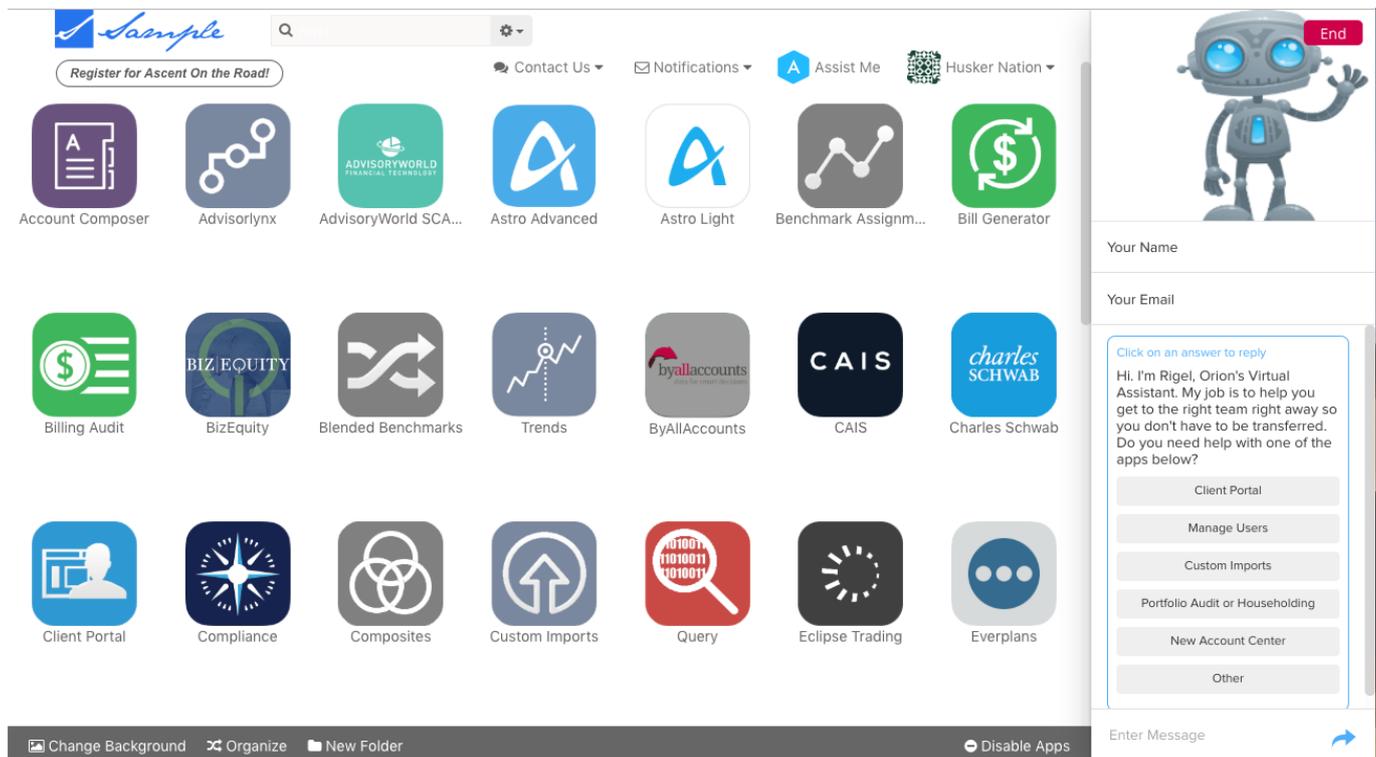
Users
Assigned

Advanced Privileges chat

Name	Enable
Chat Billing	<input checked="" type="checkbox"/>
Chat Compliance	<input type="checkbox"/>
Chat Financial Planning	<input checked="" type="checkbox"/>
Chat Implementations	<input type="checkbox"/>
Chat Integrations	<input checked="" type="checkbox"/>
Chat MarketData	<input checked="" type="checkbox"/>
Chat Performance	<input checked="" type="checkbox"/>
Chat Platform Support	<input checked="" type="checkbox"/>
Chat ProductPrices	<input checked="" type="checkbox"/>
Chat Reconciliation	<input type="checkbox"/>
Chat Reporting	<input checked="" type="checkbox"/>
Chat ServiceTeam	<input type="checkbox"/>
Chat Trading	<input checked="" type="checkbox"/>

And, while you're there, be sure to enable access to all of the other SME Teams you may need to contact.

Once you have access, Rigel will be at the ready to answer your Platform Support questions and/or direct you to the right team if you are unsure of where to go. Just simply click the "Platform Support" option in the "Contact Us" drop down in the top navigation bar, and Rigel and a chat box will appear on the right side of your browser.



Right now, you can only choose the chat for Platform Support, but you can always upgrade the chat to an audio or phone call once you get to the live operator. And since Rigel is a robot, you won't hurt his feelings by wanting to talk to a human. Well, maybe a little.

Go on, now. Get chatting with Rigel!

A Better Client Experience

Rigel is just one way Orion is transforming the client experience. Are you delivering the type of experience your clients expect?

Check out this white paper about how the digital world is redefining client experience and why it's more important than ever to deliver a next-level experience in today's competitive landscape.

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