Orion and Redtail Empower Client Relationships with a Deeper Integration

For most financial advisors, the CRM system isn't just part of their tech stack: it's the foundation.

And as CRMs go, Redtail is a top choice for many advisors. Its cloud-based solution allows you to keep detailed records of your clients' data, streamline workflows by generating and tracking activities, and categorize and tag records for easy retrieval. Redtail also backs up your data to a secure, offsite location every night to keep it safe.

To keep your business running smoothly and efficiently, Orion and Redtail already offer a deep integration, including access to key Orion features within Redtail, like the Insight app, Eclipse™ trading, and Reports, creating a seamless, streamlined experience for advisors using both systems.

Rather than having to switch back and forth between Orion and Redtail, advisors can complete essential operational functions from Orion within Redtail, like putting together client presentations, rebalancing accounts, and running reports.

Within Redtail, you can also:

- Send new clients directly into New Account Center to create new households in Orion
- Launch forms using Quik! or LaserApp
- Begin digital account opening processes with larger custodians

Most importantly, a robust, intuitive CRM like Redtail, combined with Orion's powerful portfolio management solutions, enables you to strengthen client relationships, which in turn empower your firm's growth, development, and success.

Enhancing Our Integration

But errors within a CRM can derail the positive effects of the integration, causing frustration and costing advisors valuable time fixing them.

One cause of those errors? Manual data entry. And when advisors have to update client information in both their CRM and portfolio accounting tool, those errors are almost inevitable.

That's why we've enhanced our integration with Redtail to create a seamless data sync between our portfolio accounting software and your CRM. Now, any updates to contact records made in either Orion or Redtail will automatically push to the other system, so you only need to enter data once.

How does it work?

In either Orion or Redtail, make an update to a contact record and save your changes. Next, simply refresh the other system to see those changes reflected.

It's that simple, but the benefits of this enhancement — reduced chances of error and less time spent making manual updates — can have far-reaching implications for your firm.

Want to learn more? Current Orion users, contact integrations@orionadvisor.com or 888.695.0523.

If you're not working with Orion yet, we'd love to start a conversation about how we can improve your client relationships and help make your day-to-day operations easier. Contact us today.

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