

# Unlocking Growth: The Best Prospecting Breakout Sessions at Orion Ascent 2023



As the world grapples with an ever-changing landscape, it's more important than ever for financial advisors to stay up to date with the latest trends and strategies. That's why we're excited to bring you a recap of the best "Prospect" breakouts from the highly anticipated Orion Ascent 2023 conference.

This blog will provide valuable insights and takeaways from five of the most informative and thought-provoking breakout sessions, ensuring you're equipped with the tools and knowledge to elevate your practice to new heights. With a wealth of expertise and experience to offer, you'll gain a deep understanding of cutting-edge strategies, tactics, and technologies that are driving growth in the industry.

Whether you're a seasoned veteran or just starting out, this recap will serve as an indispensable resource for any financial advisor looking to stay ahead of the curve. So, buckle up and prepare to take your practice to new heights!

## **1. Driving the Fiduciary Flywheel: Navigate Your Way to a Winning Tech Combination**

*Ascent 2023 Presenters: Mike Wilson with Brian Nelson and Rick Williamson*

The tech-savvy trio of Mike Wilson, Brian Nelson, and Rick Williamson led an illuminating presentation on how to harness Orion's Fiduciary Flywheel to navigate your way to a winning tech combination.

Orion has raised the bar by integrating best-in-class technology to simplify

advisors' lives. In this session, Ascent attendees discovered how the combination of Redtail Portfolio View (featuring portfolio view trading), Eclipse and Risk Intelligence (for model management), and Compliance (providing pre-trade validations and compliance oversight) can optimize your workflow, add valuable functionality, and drive growth for your practice.

## **2. Accelerate Your Practice's Revenue: Break into the High-Net-Worth Space**

*Ascent 2023 Presenters: Tom Wilson and Ryan LeStrange*

In this thought-provoking presentation, industry leaders Tom Wilson and Ryan LeStrange explored how you can accelerate your practice's revenue growth by breaking into the high-net-worth space.

With this market representing a massive trillion-dollar-plus opportunity, advisors who have a thorough understanding of the preferences of high-net-worth investors and institutions are poised to succeed. By learning how to leverage a tailored investment experience from Wealth Advisory and effectively execute on behalf of your clients, attendees saw firsthand how to tap into this lucrative market and elevate their practices to new heights.

## **3. Why Didn't I Think of That? Great Ideas from High-Growth Firms**

*Ascent 2023 Presenters: Client Panel led by Adrienne Fasse*

In this presentation, Ascent attendees had the opportunity to glean invaluable insights from a panel of highly successful advisors who have achieved unprecedented growth in their businesses, including practical advice to help you take your business to the next level. In addition, they shared their winning strategies and explored the pivotal decisions that helped them meet and exceed their growth expectations.

## **4. Meet Your Virtual Marketer: Build Personas & Level Up Your Marketing Game with Redtail Campaigns**

*Ascent 2023 Presenter: Rick Williamson*

Do you need help attracting new clients? We've got just the solution for you! Introducing Redtail Campaigns, the industry's first CRM-native marketing suite

that acts as your virtual marketer.

In this presentation, Rick Williamson (aka. Ricky Redtail!) took Ascent attendees on a complete walk-through of this powerful tool in connection with Redtail CRM and showed them how to build client personas and create customized campaigns with best-in-class, ready-made content designed to save you time and convert prospects into clients.

With Redtail Campaigns, you can level up your marketing game and say goodbye to the headache of trying to attract new clients.

## **5. Customer Experience Isn't One Big Thing. It's One Thousand Little Things.**

*Ascent 2023 Presenter: Rick Williamson*

In this final featured breakout, Rick Williamson of Redtail walked Ascent attendees through the importance of providing exceptional customer experiences and how investing in technologies that can support this mission is crucial. With all the choices available regarding selecting a fintech to support your business, it's easy to be overwhelmed, often resulting in analysis paralysis.

Attendees walked away with insight into how committing to a cohesive, tech-driven experience that amplifies the human touch that only you can provide can help you overcome this common challenge. Utilizing these solutions can enable you to focus on doing those "one thousand little things" right, ensuring your customers have the best possible experience.

**Mark your calendars for next year's conference, taking place March 12th - 15th in sunny San Diego! With even more groundbreaking insights and valuable knowledge from leading experts and industry leaders, Orion Ascent 2024 promises to be an event you will definitely want to attend. We look forward to seeing you there!**

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