

It's All About the Benjamin: Orion + Benjamin™ Team Up to Streamline Advisor-Client Meetings



You probably know the old saying: “Activity breeds activity.” But what if you could spend more time on the activities that foster growth within your firm, rather than clerical activities that can slow progress toward your goals?

That’s where Orion’s latest integration with Benjamin™, which helps advisors grow their business with common-sense technology, takes over. Artificial intelligence allows you to be a more efficient advisor, without having to do much at all to schedule client meetings or run reports for those meetings. Say goodbye to the old way of doing things.

Old:

~~Step 1— You, in the craziness of a packed schedule, forget to set up a quarterly face-to-face with a client. You have to rearrange your schedule to fit him in, or maybe can’t get in touch with them.~~

~~Step 2— You find a date, but in the process of scheduling the meeting, forget to put it on the calendar. You have a panicked look when you remember the meeting last minute.~~

~~Step 3— Scrambling for the client meeting means gathering reports to present during the face-to-face. That can involve heading to Orion to run reports and sending them off. Not exactly ideal with a client sitting in your office.~~

New:

Step 1 - You go to your CRM, whether it be Salesforce, Redtail, or Wealthbox, and set up a new meeting task. Benjamin™, a digital assistant, sends text messages to the client using artificial intelligence to find a date and time that work for both parties.

Step 2 - Once Benjamin™ has found an agreeable time for the meeting, the software puts the meeting right on the advisor's calendar. No need to remember to do it manually.

Step 3 - Thanks to Orion + Benjamin™, the digital assistant can pull customized reports from Orion ahead of the meeting and send them to the advisor, client, or both. Depending on your configuration, this typically happens the day before, or the day of, your client meeting. The report can then be easily saved to your CRM.

Makes life easier, right? Not only that, Wela allows you to text Benjamin™ to send you a report from Orion. All you have to do is ask for a report and tell Benjamin™ what client you'd like. The report can be sent to you almost instantly, anywhere you are.

There's something to be said for having the clerical work done for you. Instead of taking half an hour to schedule meetings with a client or get hung up in games of phone tag, you have that time to go out and get new business.

What can you do with more time in your day? To see exactly how Benjamin™ can help your business, check out this demo video.

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