

The Orion Experience Is More Than Portfolio Management. Here's Why.



When you've been around for as long as Orion has—nearly twenty years—you begin to build a certain reputation for yourself.

So if you're anything like I was, you likely hear the name Orion and think “*advisor tech solutions like performance reporting, trading, rebalancing and advisory fee billing.*” And you wouldn't be wrong, because Orion does all of those things and they do them well. Exceptionally well, in fact.

But as I was exploring the opportunity to join the Orion team — getting to know the product, the people, and the values that guide this company day in and day out — I very quickly came to this realization:

Sure, Orion is in the business of developing great portfolio management solutions. But more importantly, Orion is in the business of creating opportunities for great customer experiences.

Let me explain.

Let's Talk About Experience

Creating a positive brand or product experience means doing or providing something both useful and memorable, and requires imparting value in a meaningful and lasting way. It creates the opportunity to build trust, cultivate loyalty and, as a result, leave the type of impression that keeps customers craving more. Like staying in a five star hotel or flying first class. It's not your only option

for a night's sleep or a long trip — but there's just something about it that sure beats the alternative.

For full disclosure, as an early adopting, digital marketing nerd who has found my home in that sweet spot where financial services and technology overlap, learning new ways financial advisors can deliver an unparalleled experience through technology makes me happy. And as all marketing pros know, having the ability to truly go beyond features and functions is the gold standard for marketing strategy.

So as you can imagine, getting a first-hand, up-close and personal look at Orion and learning just how powerful this tool can be in creating great customer experiences for an advisor — beyond the nuts and bolts — has been one of the most exciting and rewarding *experiences* (there's that word again) of my new role, so far.

With features — and experiences — like

Personalized video reporting → *Which brings life to data, and data to clients in engaging and digestible ways.*

A branded client portal and mobile app → *That promotes transparency, inspires collaboration, and delivers the hand-held access modern investors demand.*

Text notifications and automated emails → *Enabling advisors to meet clients where they are with what they need to know (even when they don't know they need to know it).*

Turnkey presentations → *Allows advisors to drag-and-drop the information they want so clients can be guided through an interactive review of their portfolio.*

And there are many other capabilities that I haven't listed here, but you get the idea.

In an industry fending off threats like fee-compression, and amid a landscape where even early-adopters are beginning to blend in thanks to the ubiquity of advisor technology (if everyone has it, how do you differentiate?), the devil is in the details. And the details are the little, often unexpected, and seemingly effortless elements that make clients believe — like that five star hotel — that

there's just something about *your service* that sure beats the alternative.

So how does that evolve at Orion over the *next* 5, 10...20 years? I can't say for sure — but I know I've never been more excited to be along for the ride.

This is the first of several articles I'll be writing that explore how Orion positions advisors for successful outcomes. Look for my next post on ways in which we help advisors grow and enjoy their business.

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