

Put Your Data Into Action: HiddenLevers + Orion Empower Firm-Level Insight with a New Business Intelligence Integration Enhancement



What are your firm's most important goals?

If you're anything like the organizations surveyed by Dresner Advisory Services in 2018, your business intelligence objectives might include:

- Enhanced customer service
- Revenue growth
- Increased competitive advantage
- Improved operational efficiency and cost savings
- Better decision-making

For client-focused wealth management firms, every goal on this list is worth pursuing. And every goal on this list needs to be backed by intelligent, actionable data.

The problem today isn't lack of data: it's too much data. And filtering through mountains of information to discern which insights actually inform your critical decisions can be more than overwhelming — it can be impossible.

But what if there was a tool to do that for you? What if, instead of an endless stream of seemingly indecipherable data, you could instantly access firm-level insights to guide your decision-making?

Better Business Intelligence Insights

Meet RiskMonitor, the latest enhancement to our HiddenLevers integration, which gives the C-suite at wealth management firms the ability to monitor revenue, risk, IPS drift, and advisor performance — all from a single platform, powered by Orion data.

Throughout Orion's partnership with HiddenLevers, our focus has been on providing insights and analytics on end-client portfolios and data. This new business intelligence enhancement expands the reach of those capabilities to provide invaluable firm-level insights.

With RiskMonitor, you'll be able to better understand the health of your business from an aggregate firm-level, as well as from advisor and individual account levels.

Using the intuitive dashboard, you can quickly toggle between financial metrics, asset flows, risk analytics, or monitor against client investment policy statements.

And HiddenLevers iconic stress testing allows you to stress test your book of business across more than 80 economic outcomes, as well as construct unlimited economic what-ifs — giving you a deeper insight into the potential impact that economic scenarios like Fed's Dead, Trade War, and Business Cycle Sunset can have on revenue.



Combining groundbreaking business intelligence insights and firm-level stress

testing with Orion's powerful data, RiskMonitor is poised to become the nucleus of a firm's operations.

Not working with Orion yet? Let us know here and someone will get in touch with you right away!

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