Streamline Client Communications with Orion's New, Personalized Event-Based Notifications

As an advisor, you understand the catch-22 of client communication: you need to convey information to them in a quick, effective way — especially if immediate action is required — while also making sure they're receiving relevant information in a way that makes sense to them.

There are tools available that solve both problems: streamlining communications and offering a personalized experience to each individual client. But the cost of these tools can be prohibitive, and if they don't easily integrate with your tech stack, they won't save you any time at all.

At Orion, we don't think our advisors should have to settle. That's why we launched Event-Based Notifications, which automate the creation and delivery of both your text message and email communication strategies. Event-Based Notifications don't just allow you to keep your clients in the know around the clock, they integrate seamlessly with data across our system *and* are available at no additional cost to you.

https://oriontechno.wpengine.com/wp-content/uploads/2019/08/OrionAdvisors_EBN_032619.mp4

Get Started Right Away

Setting up your Event-Based Notifications is simple. Here are five steps to follow:

- **Choose Your Channel** – Do you want to send an email or text message?
- **Pick Your Trigger** – Select from an extensive list of notifications,

including RMDs, new accounts, client anniversaries, and many more.

- **Select Your Audience** – Decide who will receive the notification. You can send it to a single client or to a group of clients, based on their communication preferences.
- **Attach a Report** – Select a report you've built in Orion and personalize the main message with @ tags (or client-specific data points from Orion Connect) with PII automatically excluded.
- **Give it a Final Look** – When the event occurs, an automated communication appears in the review queue (also found in the Reporting app), allowing you to approve, edit, or delete the notification. Then, hit send!

Here's a list of what you can update your clients on:

Portfolio Updates

- New Accounts
- MoneyGuide Probability Score
- Riskalyze Risk Score
- Management Style Change
- Model Change
- Market Value
- Performance
- Rebalance
- Trades
- AUM vs. NAI
- Contributions
- Distributions

Critical Alerts:

- RMD
- Capital Call Schedule
- Distribution Schedule

Milestones:

- Welcome messaging
- Birthday messaging

- Client anniversary

How You'll Keep Winning with Event-Based Notifications

Delivering a best-in-class client experience will keep your clients coming back — and attract new ones. Here are just a few advantages of using our new tool:

The Gift of Time: Now you can automate the type of communications that historically have been managed on an ad-hoc basis (e.g. happy birthday emails, portfolio rebalance updates, etc.), and focus your time on strengthening your client relationships.

A Leg Up on the Competition: Differentiate yourself from top competitors by communicating with them in a consistent, personalized way. Doing so will transform the industry's standard definition of putting the client first.

Increased Trust and Transparency: Event-Based Notifications allow you to quickly grab a client's attention with updates on the information they value most, delivered right to the palm of their hand. This shows clients that you value their time and care about their needs.

Orion's Event-Based Notifications are changing the game in an industry saturated with competition. Being able to send your clients a personalized message with your branding through an email or text message helps you stand out from the crowd while also letting your clients know you're dedicated to providing the ultimate customer experience.

Want to learn more about taking personalized communication to the next level with Event-Based Notifications? Check out our webinar, coming up on September 12th.

Don't work with us yet? Let's talk about how you can leverage Event-Based Notifications and our other great features today!

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