



Orion's SWOT Team: Saving Firms Time and Boosting Expertise

At Orion, we understand choosing the right technology is a big decision and a big investment in your business—one that doesn't end after onboarding. Simply put, it's not enough to have access to the right technology; you need to be able to effectively use it so you can maximize its benefit and better streamline your back office.

That's why we do more than just develop smart and scalable technology. We also support you every step of the way with a culture that loves innovation, embraces customization, and provides you with the consultative resources you need to master your technology—and your business.

And now, we're taking our service to the next level with Orion's SWOT (Special Work Ops Team), a specialty services team available to ensure you're getting the most out of your Orion technology.

What is SWOT?

Comprised of an elite squad of Subject Matter Experts (SMEs) Orion's SWOT has the expertise to take action to maximize your technology's benefits—saving you time and resources.

For less than the cost of adding a new employee, our experts in billing, reporting, account and data maintenance, and onboarding will act as a dedicated resource to take on your firm's back-office operations. This means cleaner data with less effort.

Two Levels of Support to Fit Your Firm's Need

Your business is unique, which is why we customize our technology to fit your needs (and not the other way around). Now, we're applying this same logic to SWOT—providing your firm with access to two styles of service so that it better fits your business needs, including ongoing support, á la carte options, or both!

Ongoing Support

Simplify your technology support and its cost! With an ongoing support agreement, you'll receive access to account setup, billing and reporting, and data audit services.

Account & Household Setups

- Account creation in the New Account Center
- Exclusion table review
- Householding and download source setup
- Portfolio groups setup

Quarter End Assistance

- ACR audits and review
- Account cancellations
- QE Dashboard audit reviews and assistance

Billing & Reporting

- One mock bill and live bill per quarter, run in arrears with average daily balance
- One report batch per quarter

á la Carte

Customize your SWOT support with access to the services that matter most to your firm.

Manual SOWs

- Statement entry
- Transaction history maintenance
- Account linking for performance
- History reconciliation

Alternative Investment Platform (AIP) SOWs

- Account creation and management
- Account reconciliation and troubleshooting
- Statement entry
- Transaction and activity history review
- Product and valuation setup

Master Client List (MCL) & Onboarding Assistance

- MCL setup and import
- Data pulls from other platforms (e.g. PortfolioCenter, Tamarac, Advent, etc.)

And if you're interested in CRM conversions and consulting, we can help too! Costs will vary depending on the size and scope of the project.

How SWOT Can Help Your Business Grow

With SWOT, you can count on getting the most out of Orion's technology without asking your team to take on the task of mastering all of the robust tools. Whether you're new to Orion technology or you're an experienced Orion user, SWOT is designed to be the solution for firms of all sizes looking to better use their Orion technology without adding resources to their teams or spending time that could be spent growing their business.

Ready to learn more about how SWOT's subject matter experts can start working for your business? Contact us at SWOT@orionadvisor.com.