Tell a Better Story with Orion’s Insight App

Think about the best storyteller you know.

It’s likely he or she has an arsenal of storytelling tools — such as repetition, foreshadowing, hyperbole, analogies, and imagery — from which to draw in order to set the scene, dial up the drama, and make you feel invested in the outcome.

Most importantly, good storytellers make you feel like you’re part of the action, whether you were there or not. They don’t cop out at the end with “You really had to be there.”

As an advisor, you know that client meetings are critical for developing strong client relationships. And in those meetings, the story you tell is important. Clients should feel like they have an active role in their portfolios; it’s up to you to give them that experience.

Why it Matters

Client experience is certainly a hot topic in the financial industry — but why? After all, as long as you’re growing your client’s portfolio, shouldn’t that be enough?

Maybe that’s one piece of the puzzle, but to turn your clients into advocates for your business, you need to take care of them mentally and emotionally alongside their financial well-being. Think about your clients who aren’t in the industry themselves: finance is a foreign world to them, and trusting their money to a stranger is risky, no matter how they choose to invest it.
So it’s critical that you make them feel not only comfortable, but understood and included. And Orion’s client experience tools are designed to do just that.

In a recent survey*, 33% of our advisors named our Client Experience tools — Client Portal, Mobile App, plus email and video creation tools — as our most impactful features. Fifty-two percent of our advisors say that these tools give them the ability to provide clients with a comprehensive view of their financial life, while one-third of our advisors increased client acquisition and client retention by 30-50% after they began working with Orion.

*data from a 2018 client survey

Enter Insight, Orion’s Dynamic Reporting App

Insight empowers you to deliver a next-level client experience through meaningful client conversations with the ability to collaboratively review portfolio details on screen during meetings. Without the distraction of paper reports — and with visually appealing charts, graphs, and tiles — advisors can guide their clients through the story of their portfolio in a way that helps them focus on important information.

And Insight is completely customizable; you get to set the scene for client meetings by choosing which tiles to include, such as Target Allocation, Gain/Loss, Estimated Income, and, coming later this summer, Fixed Income. Performance, Holdings Detail, and Holdings Summary tiles can be grouped by Product, so you can aggregate the same assets across multiple accounts into one easy-to-understand line item.

You can also add commentary to address market movement or announce firm updates. Again, making your clients feel like part of the financial picture you’re painting helps to strengthen their trust and confidence in you.

Insight’s deep integration with Asset-Map, a visualization tool that allows advisors to map and organize client assets, liabilities, cash flows, and future financial projections on a single screen, takes client empowerment even further. Being able to see traditionally dry financial information displayed graphically helps facilitate clients’ understanding of concepts that may still feel foreign to them.
Finally, you can grant your clients access to Insight from within their Client Portal by permissioning the tiles you want them to be able to see.

Client experience matters. Give your clients a more active role in their own stories with Orion’s tools, including our Insight app.

Not working with Orion yet? We’d love to start a conversation and show you how Orion can help you improve your client relationships. Let us know here and we’ll give you a call right away!

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