Three Reasons You'll Love the New Two-Way Data Sync Between Orion and Redtail

When Orion originally joined forces with Redtail, a cloud-based CRM solution, we designed the partnership to keep your business running smoothly and efficiently by offering access to key Orion features within Redtail, including Insight tiles, an Eclipse™ trading widget, and Reports.

We also made it easy to push new accounts from Redtail to Orion, to launch forms using Quik! or LaserApp, and to begin digital account opening processes with larger custodians.

But good is the enemy of great, so we've taken our integration with Redtail a step further to continue empowering your firm's growth, development, and success.

We now offer an automated two-way sync between Redtail and Orion.

What does that mean for you?

Any updates to contact records in either system will automatically flow through to the other, eliminating the need for duplicate manual data entry. The two-way sync is available to Orion and Redtail users at no additional cost.

Why does it matter?

Simple convenience aside, here are three reasons we recommend enabling the two-way sync:

1. **It saves time**, a premium resource for advisors. Using the two-way sync

eliminates the need to constantly update contact records, since doing it in one system automatically makes the same changes in the other.

2. **It reduces the potential for errors by reducing the amount of necessary manual data entry. When advisors have to make updates in two systems — especially if they're trying to make them quickly — human error is almost inevitable.**
3. **It's easy to set up**. The two-way sync between Orion and Redtail can be enabled in just a few simple clicks, with no need for downtime in either system.

Who does it benefit?

Implementing the two-way sync has far-reaching benefits, not just for advisors, but also for their clients.

Advisors can spend more time focusing on their clients and less time on entering data (or correcting it), which is critical for improving relationships and ultimately driving business growth.

Clients can rest assured that their information is accurate in both systems, which improves data security overall. And the more time their advisors have, the more time they can dedicate to their clients, resulting in stronger relationships and potentially greater portfolio returns.

With so many benefits and a nearly effortless implementation process, the real question is: Why **wouldn't** you save time by setting up the two-way sync?

Want to learn more? Current Orion users, check out our FAQ document here, or contact integrations@orionadvisor.com.

If you're not working with Orion yet, we'd love to start a conversation about how we can improve your client relationships and help make your day-to-day operations easier. Contact us today.

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