Your Best Prospect is Your Current Client: How HiddenLevers and Orion Help Advisors Grow Relationship

Did you know that it costs five times as much to acquire a new client than to retain an existing one? According to the Harvard Business Review, your resources are well spent working not just to gain new clients, but to better satisfy the clients you have.

Here at HiddenLevers we understand how valuable prospecting is for your firm's growth, but your current clients are just as important as your prospects. One of the greatest benefits of maintaining relationships with existing clients is that most of the heavy lifting is done. With existing clients, you have a few key advantages, such as:

- You've already proven you are the best advisor to fit their unique needs.
- You've already invested the time to identify and cultivate relationships with key decision makers.
- Your communication with clients no longer focuses on the tactical compliance review meetings and system set up.

Since you have your foundation in place, now you can focus your time with established clients to make sure they're here to stay. Your success is based on their happiness with your results, and if you're able to provide what you promised, their word alone can lead to referrals as they become your walking billboard.

But clients can do more than send business directly through referrals.

Maintaining client retention also becomes helpful in building your brand and maintaining a good reputation. There's no stronger testimony than to be able to say you've led your clients to growth and success over a relationship built through many years.

How Do You Maintain Your Best Prospect?

Trust is an important part of turning prospects into clients and maintaining relationships with current clients. Having meaningful conversations about risk and your clients' finances is a great way to build trust and a successful relationship. These conversations can be difficult, but they don't have to be. HiddenLevers is a client engagement tool designed to facilitate these types of conversations, so your clients, and even prospects, understand what's happening in their portfolios.

So, how does it work? First, HiddenLevers pulls in data to map out the relationships between economic factors and your clients' investments. Using this map, the HiddenLevers research team is able to create different scenarios for the economic environment. You're then able to model the impact of these different scenarios on your clients' portfolios.

While HiddenLevers is valuable for client retention and relationship-building, it also supports lead generation. It can help you enhance current client relationships as well as get prospects in the door. Through an integration with Orion's client experience tools, HiddenLevers helps keep you front and center with your clients and prospects.

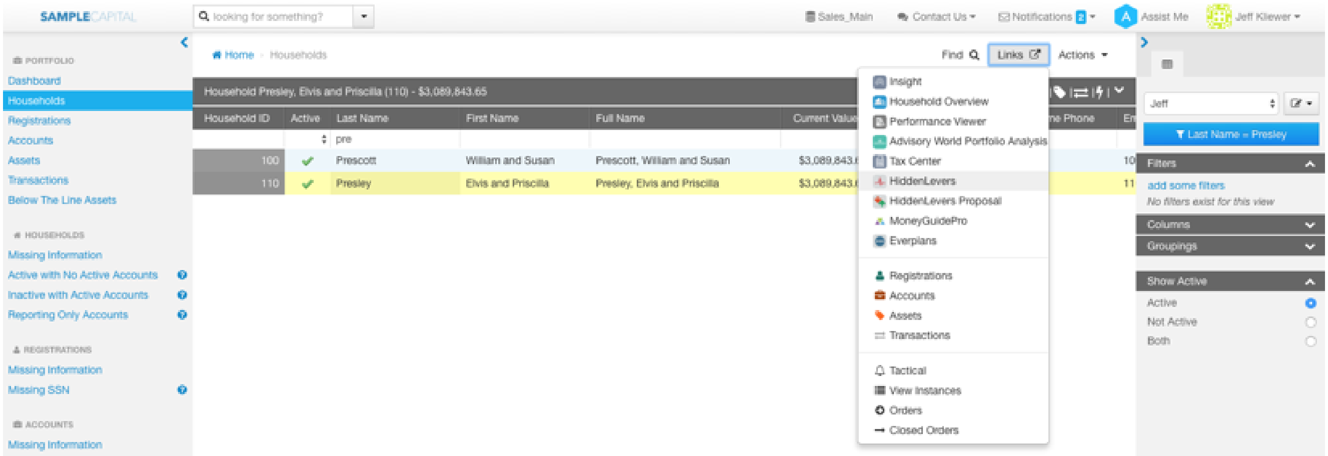
Benefits of the HiddenLevers + Orion Integration

Through HiddenLevers, you have access to proprietary stress testing with 160+ scenarios to visually demonstrate how your client's portfolio will react under certain macroeconomic conditions. HiddenLevers also automates the client experience by equipping advisors with portfolio analytics and customizable tools to communicate risk with clients in an impactful way.

By pulling client data from Orion into HiddenLevers for analysis and presentation, you can eliminate manual processes and use your time for revenue-producing activity instead of technology maintenance.

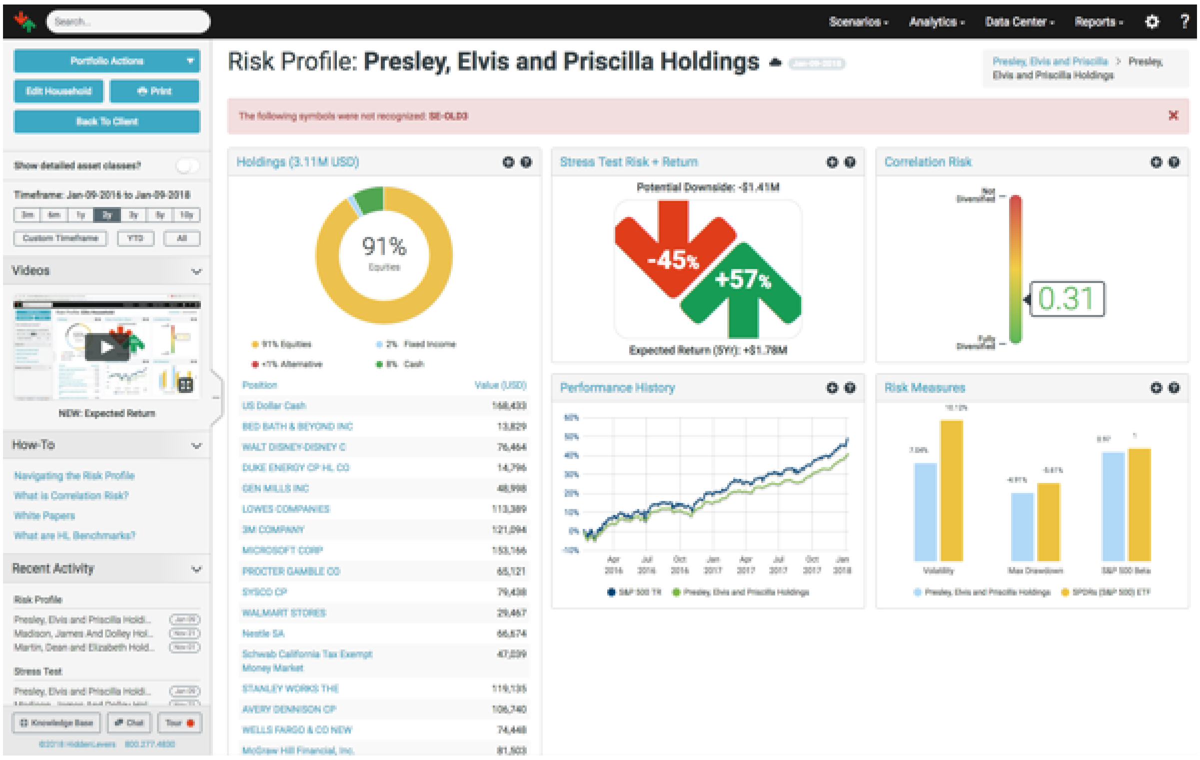
Integration Points

Launch HiddenLevers from a Household in Orion (single sign-on)

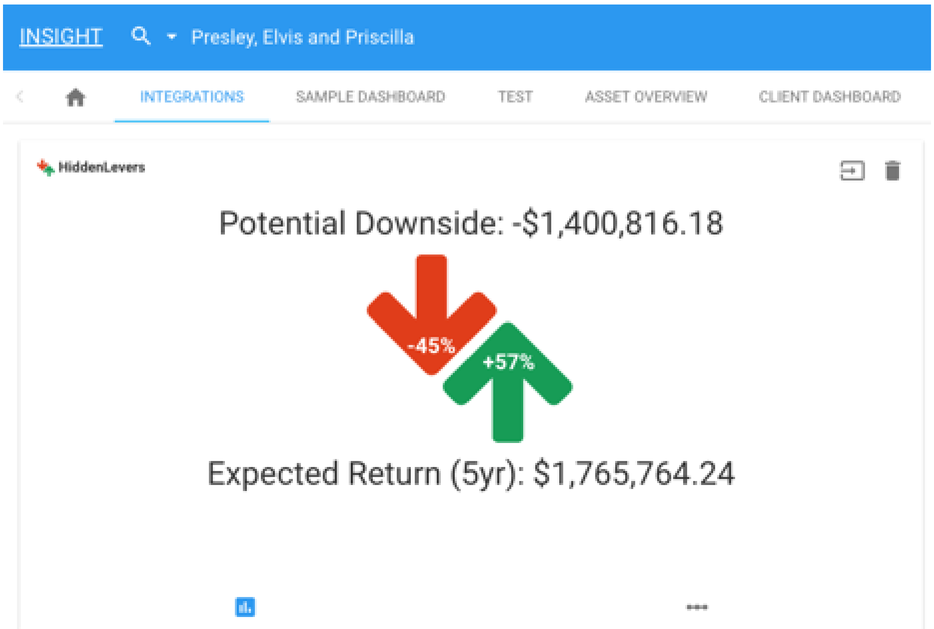


Access to Orion Household data in HiddenLevers

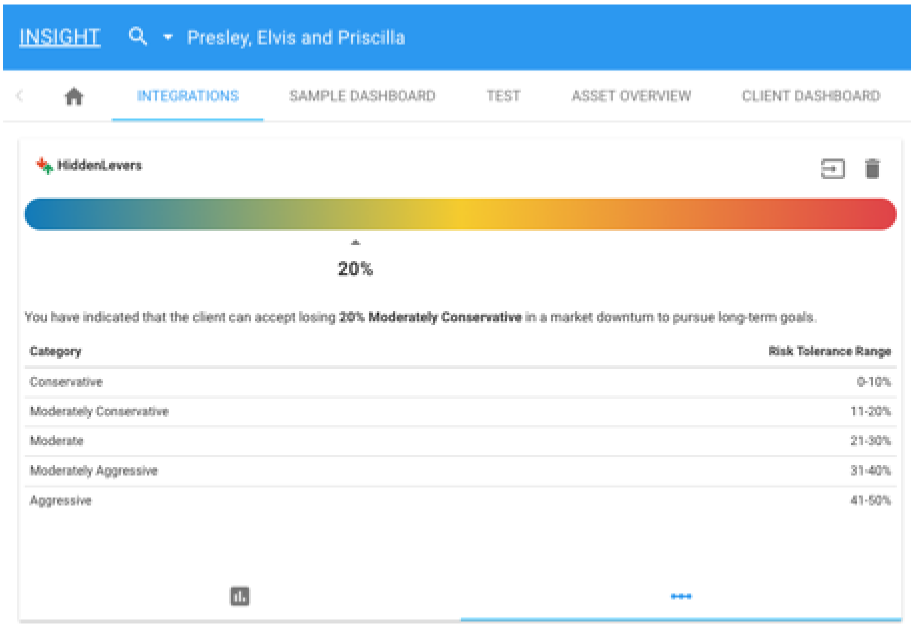
HiddenLevers widgets added to an Insight Dashboard



Risk & Return Analysis Tile



Risk Tolerance Range Tile



HiddenLevers’ capabilities combined with Orion’s applications streamline the data collection and communication process for an enhanced client experience.

As markets continue to be volatile, clients rely on partners like Orion and HiddenLevers even more. Be sure you are investing time into your clients so they understand all of the services you offer as you help them navigate the storm of financial uncertainty.

To learn more, watch our webinar about the integration here.

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