Launch Checklist:
Upgraded Client Portal Experience

In the absence of face-to-face meetings, the online financial portal you provide is among the most tangible and important elements of your brand. Through it, clients have immediate, anytime access to your firm and their finances. When it comes time to upgrade that experience, it is important you create an effective communications plan that ensures clients understand the benefits of the new upgrades and how to use them.

This checklist can help build that plan. Use it to guide your own process of communicating your upgraded technology to clients.

1 Step One: Get Your Team Ready

- [ ] Before you can communicate out, you must be aligned across your team. Take the time to brief your team on the new portal, it's benefits to your clients, and each team member's responsibilities in deploying it.

2 Step Two: Build a Profile of Your Client

- [ ] Effectively promoting your upgraded client portal begins with an understanding of what exactly motivates your clients. Go through such things as what features they use today, what features they don't, what their most pressing client portal needs are, and so on to help create a detailed profile that will inform your activities later on.

3 Step Three: Craft Your Message

- [ ] With a profile in place, craft a message that matches that profile. Focus on how your new portal will specifically address their needs and tailor your language so that it is as impactful as possible.

4 Step Four: Set a Date

- [ ] The pieces are on the board, now it's time to get them moving. Work with your team to set a date to deploy the upgraded portal. As a reminder, **here's how** you can transition from the legacy portal to the new one.

5 Step Five: Create Launch Assets

- [ ] What you say and how many places you say it is up to your firm. However, you should prepare at least a few assets that detail your upgraded client portal such as a one-page Fact Sheet or Powerpoint Presentation. Other assets you may find useful include an FAQ document, social media posts, email messages, and blog posts, among others.

6 Step Six: Send Your Assets

- [ ] Whether you have a simple client-wide email queued up or a whole host of assets ready to send, now is the time to send away!

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XXXX-OAS-08/26/2020