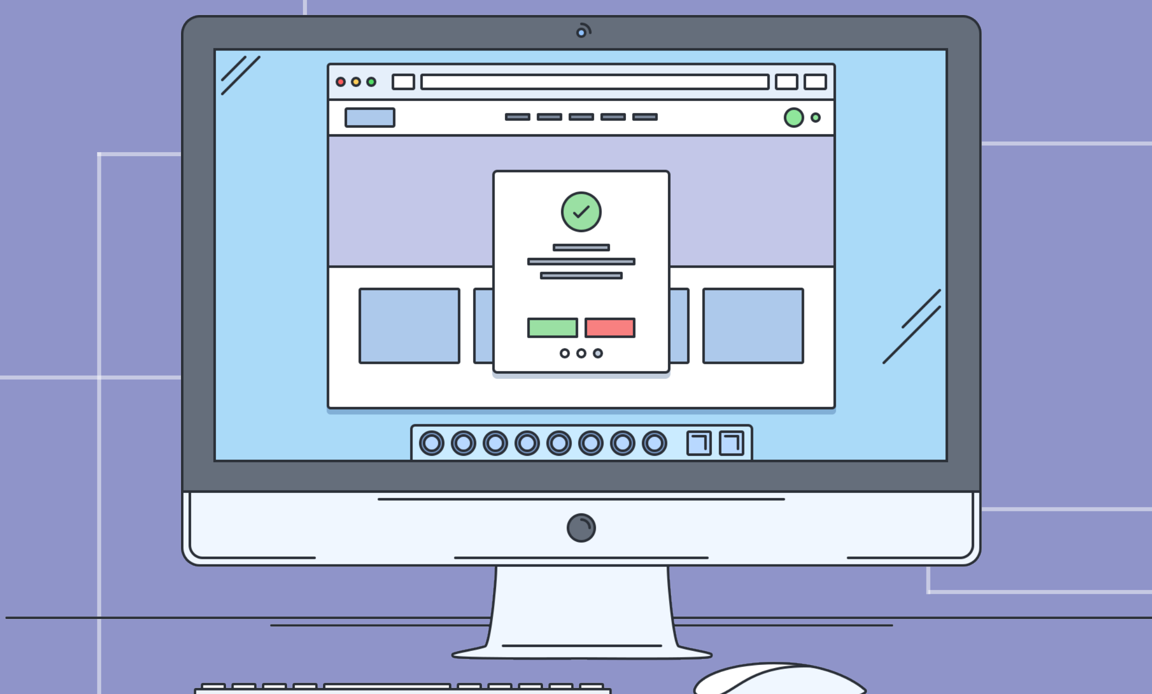
BOOSTING EFFICIENCY THROUGH INTEGRATION

HOW ONE ADVISOR INTEGRATED SALESFORCE AND ORION TO INCREASE STAFF PRODUCTIVITY



ORION

ADVISOR:

MCLEAN ASSET MANAGEMENT CORPORATION

HEADQUARTERS:

MCLEAN, VA

PROFILE:

MCLEAN ASSET MANAGEMENT IS A REGISTERED INVESTMENT ADVISORY FIRM THAT HAS LEANED ON THE ANALYSIS OF IN-DEPTH EMPIRICAL RESEARCH TO INFLUENCE ITS RETIREMENT PLANNING RECOMMENDATIONS FOR INVESTORS OVER THREE DECADES.

THE PROBLEM

Time is money. When you're constantly jumping between applications to complete daily tasks and sometimes doing the same task in multiple places, you're losing out on both.

McLean's operations team found themselves in that situation more times than they wanted, and even after implementing the Orion platform, they needed to find a way out of it.

Logging into their existing CRM solution to keep track of client data and logging into Orion to check portfolios and account balances - not to mention all the other portfolio management tools necessary -lacked a cohesiveness. Answers weren't easy to find.

For instance, which system would be used as the system-of-record for client contact information? Without syncing data between the two systems, it might be impossible to ever say with certainty that they would always both be 100% accurate.

The answer arrived with Orion's integration with Salesforce, the most-used CRM system in the world.[1]

THE SOLUTION

Now, almost a year after it first began its Orion and Salesforce integration implementation, McLean can attest to the headaches the interplay between the two platforms has alleviated.

In the eyes of Brian Hyun, Managing Director, the mutual data sync between the two platforms has provided tremendous value. When it comes to portfolio information such as account name, account number, and more, the data is primarily stored and updated in Orion. However, contact information for clients such as their household name, address preference, contact options like email, and other data is updated in Salesforce. Thanks to the data sync, the information updated in one system is simultaneously updated in the other. The days of worrying about missing data and duplicating steps between multiple systems are a thing of the past.

[1] *http://www.capterra.com/customer-relationship-management-software/#infographic*

"There are lots of untapped possibilities right now. Eventually, Salesforce will integrate with every software we are using, and it will be the core function of everything we do. That will make our lives easier."
-Brian Hyun, Managing Director

More than the data sync capabilities, however, the integration has also significantly affected how McLean's advisory team goes about meeting prep and client interactions.

Rob Papa, Wealth Manager, uses the Orion Connect integration to ensure new assets are properly transferring, as well as review and update client performance numbers before a meeting or call.

And because the full Orion Connect app suite is available right inside Salesforce, Papa can check client notes before a meeting and run a performance report, all in a few clicks and without ever leaving the Salesforce environment.

The integration becomes even more valuable when a client places a phone call to ask a question. Papa can pull up portfolio performance or investment information quickly while they are talking so they can look at it together.

The combination of Orion and Salesforce saves Papa valuable time—at least 30 minutes a day. The fact that he can seamlessly answer questions without fumbling between multiple systems offers just one more way he can reassure clients that he is on top of their constantly evolving financial situation.

LEAVING THE DESK BEHIND

Beyond the data management benefits, the integration also provides McLean with benefits from a business management perspective. The firm has created a uniform dashboard across their entire company to track incoming new accounts and contributions, how much each advisor manages, the number of outstanding tasks across the firm, and more Key Performance Indicators (KPIs) that were previously untraceable.

Additionally, Alex Murguia, Managing Principal, believes that from a user standpoint, integrating Orion and Salesforce allows an advisory staff to untether from the desk and achieve a truly mobile solution. The Salesforce platform also allows the firm to bring in additional top-of-line SaaS technology, like Microsoft 365 and Citrix ShareFile, and integrate it all together into an enterprise-level virtual office.

By starting with integrating Orion with Salesforce, McLean is close to having one place for their advisors to go to get any type of information for their clients. Whether it's demographic data from Salesforce or overall account value and a summary of tax information from Orion, an advisor can access it all quickly from a single location.

The next step for McLean is adding more customization with Salesforce as the base foundational layer. As the firm plugs in more apps and brings all its systems into a cohesive environment, they'll have one single hub to run their business operations.

"Now, we can embrace new technology in our firm. In a way, it clears a bottleneck in terms of getting a foundation set. We can bring in other technology to help us optimize our firm."
-Alex Murguia, Managing Principal

CONTACT US

If you would like more information about Orion, please visit orionadvisor.com or contact us at 402-496-3513 or empower@orionadvisor.com.

Orion Advisor Services, LLC ("Orion") provides portfolio accounting services for advisors. Orion does not solicit business on behalf of its clients, and cannot guarantee improved performance or an increase in AUM through the use of its services.