

Here's How To Introduce The Orion Client Portal To Your Clients

When adding new technology to your firm, it's important that your new solution provides a net benefit not only to your employees, but to your clients as well.

Sometimes that benefit passes-through from team members on to clients. For example, if your employees save time on routine tasks, they can instead, spend more time focused on client's specific needs.

Other times it means the technology you choose can be available to be used by your clients and enjoyed by them, with no interaction between a client and your firm's employees.

Offering a Client Portal gives you a way to add value to clients with the technology you use.

So, if you want to be the center of their financial conversation, it's important that you provide a comprehensive Portal experience rather than relying on custodian websites.

That's where Orion's Client Portal comes in.

Our portal gives you valuable insight into your clients' behavior. If clients use custodian sites to view their accounts, you can't know how active they are in checking their portfolios.

Orion User Tip: Access these insights in the **Manage Users** app. Go to the **Clients Menu** and select the **Last Login** column or view individual clients by clicking on a user and looking at **Login History**.

When used properly, technology you use with clients can foster greater loyalty, help you better understand their goal, and help you build stronger overall relationships.

In today's post we'll walk you through a primer on how to introduce the Orion Client Portal to your clients.

1. Communicate the Client Portal's Benefits

Orion's Client Portal offers many benefits for your clients, such as:

- A simple, single login to view all their accounts through Orion's aggregation power.
- New opportunities to increase their financial literacy by accessing your content published through the portal.
- A simple and intuitive way to see how their accounts are performing and what their portfolio balances are at any given time.
- 24/7/365 access, so they never have to wait to see account details.
- An easy way to schedule appointments and get in touch with you through Orion's Calendly app integration.
- Access to additional information such as a financial plan you've created together in your financial planning software.

The screenshot displays the SAMPLE CAPITAL Client Portal interface. At the top left is the logo 'SAMPLE CAPITAL'. On the right, a user profile for 'Martin, Dean and Elizabeth' is shown. A navigation bar contains links for Portfolio, Insight, Documents, Tools, Updates, InStream, and Planning. Below this, there are links for Commentary and News Feed. The main content area is titled 'Advisor Commentary' and features a link to 'Our Latest Market Commentary' with the subtitle 'Everything to Know About Your Risk and Returns'. Another link is titled 'The First Five Steps When Retirement Approaches' with the subtitle 'Consider focusing on a plan for these four areas of financial planning to help gain confidence as you approach or enter retirement.' The date 'May 17, 2017' is shown below. On the right side, there is a section for 'AVAILABLE DOWNLOADS' listing 'privacy policy.pdf', 'formadv-part2.pdf', and 'Q1 Newsletter.pdf' with a date of 'Sep 8, 2017'. Below that is the 'YOUR ADVISOR' section for 'ANTHONY STARK', dated 'Jun 15, 2017', with contact information: '(402) 496-1234', 'tony.stark@avengers.com', and '17605 Wright Street Omaha, NE 68130'.

2. Get Familiar With the Portal

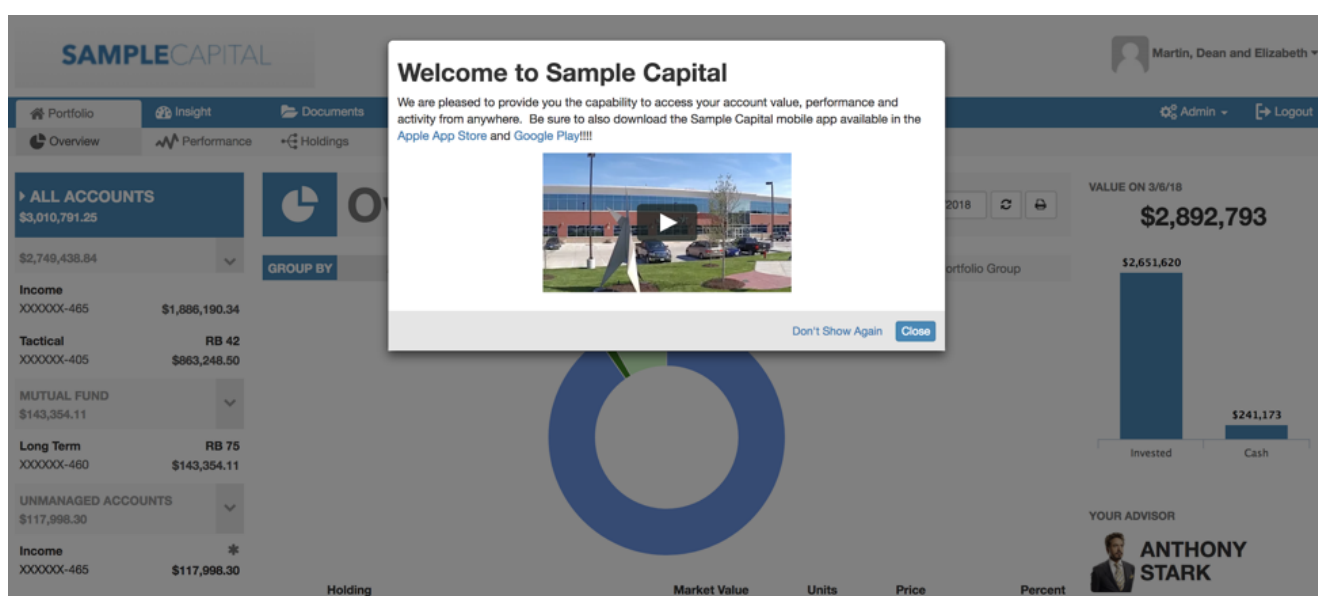
Before you can invite clients to use your Portal, it goes without saying that you need to get familiar with it yourself and customize it for your firm's needs.

The Orion Client Portal allows you to choose the setup you want. From the individual reports you want clients to access on their own, to the colors of the app so you can match your firm's brand, to the first thing your clients will see when they log in.

Orion User Tip: Go to **Admin > Settings** to get started.

3. Make a Good First Impression

That initial message that clients encounter can be an important part of how you introduce the Portal to your clients. Your team can upload a welcome video, tutorial, or text-based message to appear when clients first log in. Whatever you choose, we recommend that you take advantage of this functionality so you can add a welcoming experience for your clients when they first use your new Portal. Here is an example:



As clients use the Portal, it's also important to consider how you can help shape the experience as time goes on. Part of your firm's setup process should be to create help documents that you can either send to clients or that your team can reference for when questions about using the Portal come up. If you need ideas for content you should have on hand, our Subject Matter Expert teams are available to help!

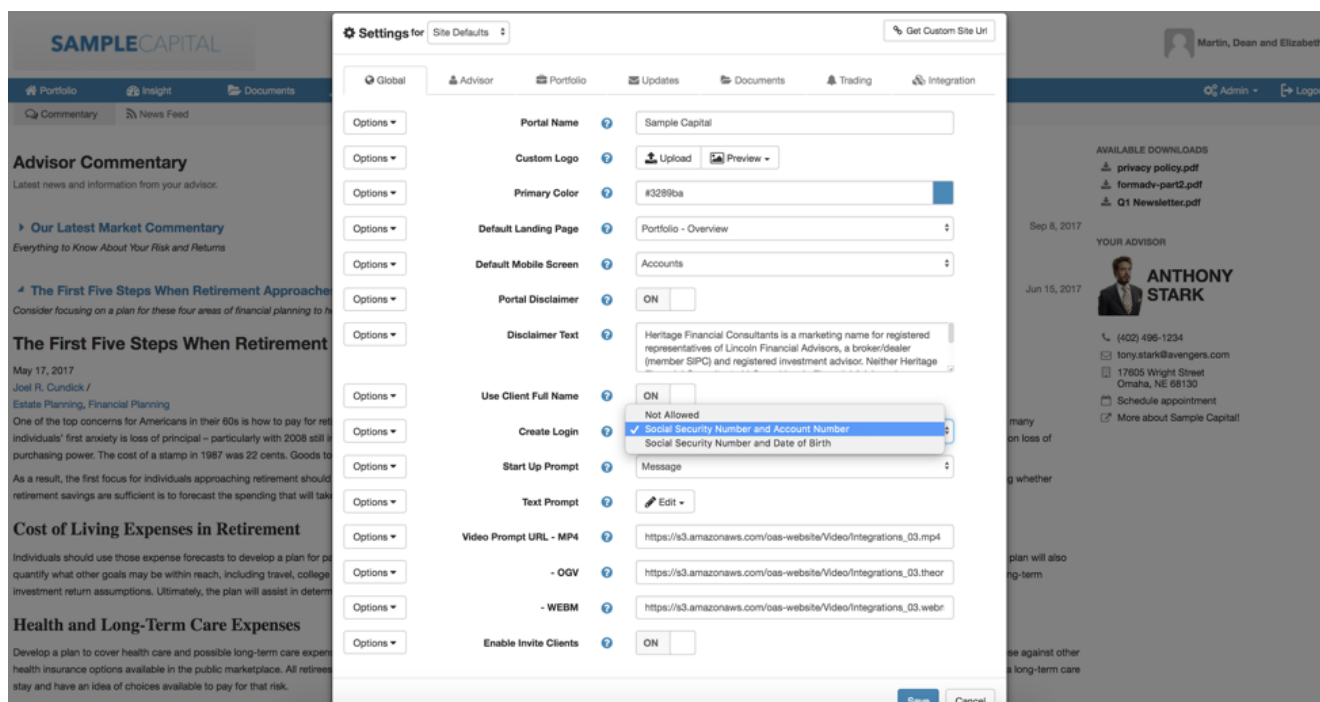
4. Invite Your Clients

Once your Portal is ready, it's time to get clients using it. Just as you prepared your own team before you reached this point, it's also important to prepare your clients prior to your launch.

Before you send an invite email, prep your clients with an announcement email to let them know the Portal is coming, and what benefits it can bring to how you work together.

Orion User Tip: Orion makes it simple for you to get clients logged in and using your Portal.

- You can invite clients in mass with pre-created logins via the Manage Users app. The New User Import action lets you create a batch of logins and send out customized email notifications to your clients with a link to setup their profile. If you'd prefer to email clients yourself, the app can download a login list so you can do that.
- Or, you can enable the ability for clients to create their own login with the correct information (such as social security number and account number). Go to **Admin > Settings > Global** to find this feature.



The best way to enjoy a successful client portal launch is to put in the time to train your staff on the portal, customize it to fit your needs, and then clearly communicate its benefits to your clients.

Regular, recurring prompts to sign up and use the portal, with reminders on why it's an important element of your financial approach, will help you bring clients into a technology-enabled relationship with your firm.

Not already an Orion Client?

[Click here](#) to schedule a call with our team for a personal demo of how the Client Portal can help you create stronger client relationships.

If you currently work with Orion, please log into Orion Social to contact Orion Support getting started.

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