

Event-Based Notifications

Elevate your client communication strategy

Coming Q2



What are Event-Based Notifications?

Event-Based Notifications allow advisors to automate the creation and delivery of text and email communications. Events include popular milestones, such as birthdays or anniversaries, as well as timely account updates and alerts, like trades or distributions. Once an event is selected, advisors can choose from hundreds of client-specific data points in Orion Connect—like asset class or cost basis—to automatically personalize the communication.

What are the Types of Events from Which Advisors can Choose?

Orion has pre-loaded default email and text messaging for the following events. Once an event is selected, the system will generate and distribute a message—through the chosen communication channel— each time the event occurs for a client.

While email and text messaging have already been pre-loaded for the following events, advisors can edit and customize the messaging before scheduling the communications.



Milestones

- Welcome
- Birthday



Updates

- New Accounts
- MoneyGuidePro Probability Score
- Riskalyze Risk Score
- Management Style Change
- Model Change
- Market Value
- Performance
- Rebalance
- Trades
- AUM vs. NAI
- Contributions
- Distributions



Alerts

- RMD
- Capital Call Schedule
- Distribution Schedule

What are the Benefits of Event-Based Notifications?



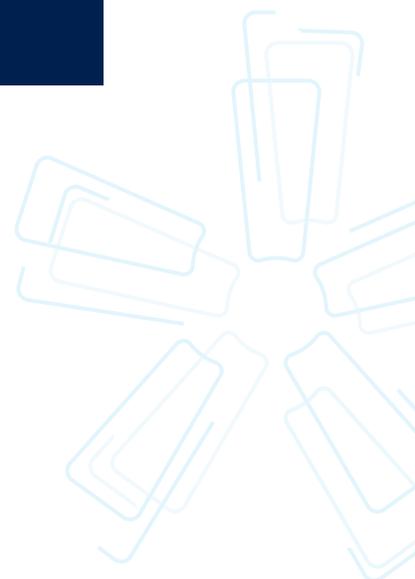
Scale:
Create client groups to send notifications more efficiently

Personalization:
Access hundreds of client-specific data points for each notification

Customization:
Control the notifications clients receive and through which channels they receive them

Intelligence:
Append relevant reports to notifications—with PII automatically excluded

Flexibility:
Send notifications via email, text, or both



Why Would Advisors use Event-Based Notifications?

Event-Based Notifications empower advisors to automate the type of communications that historically have been managed on an ad-hoc basis (e.g. happy birthday emails, portfolio rebalance updates, etc.), reducing the time spent drafting and sending individual client communications.

Additionally, Event-Based Notifications promotes transparency between the advisor and client, and not only encourages but also simplifies the execution of a proactive and consistent client communication strategy. By keeping clients updated on the events that matter most to them, advisors can demonstrate their value as a true partner and fiduciary.

Contact Us Today

Ready to elevate your digital client communication strategy?



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