

Small Business Financial Services Company

Introduction

This case study of a small business financial services company is based on a September 2022 survey of Orion Advisor Tech customers by TechValidate, a 3rd-party research service. The profiled company asked to have their name blinded to protect their confidentiality.

“Billing and reporting has been a game changer. The amount of time we now save using Orion’s billing and reporting is absolutely incredible.”

Challenges

The business challenges that led the profiled company to evaluate and ultimately select Orion Advisor Tech:

- The reasons they chose Orion over the other portfolio management options were:
 - Orion provides the best end-client experience
 - Orion is the best long-term solution as we grow and scale
- They started looking/ultimately switched to Orion because:
 - Their previous tech didn’t integrate with the tools they needed
 - The previous tech was stagnant and wasn’t meeting their evolving needs
 - The support and service of my previous tech were poor

Use Case

The key features and functionalities of Orion Advisor Tech that the surveyed company uses:

- Compared to the other solutions they considered:
 - The integrations through Orion save me time
 - Orion offers better integrations than other providers they considered
- Compared to their previous provider or other providers they considered Orion’s:
 - Reporting (Report Builder, Composites, Alternative Investments Platform, RMD Dashboard, etc): Significantly Better
 - Billing: Best in Class
 - Trading (Integrated Trading and Rebalancing): Better
 - Client Experience: Better
 - Integrations: Significantly Better

Results

The surveyed company achieved the following results with Orion Advisor Tech:

- Before selecting Orion, they also considered:
 - Investnet Tamarac
 - Black Diamond
 - Advent APX
- Orion connects well with the other tools and saves time because of its deep integrations
- How long it took to see a return on their investment in Orion:
- They described their onboarding experience as:
 - The data conversion was successful thanks to productive collaboration with the Orion team
 - The customer service was great and Orion’s teams were with me every step of the way
- When it comes to the future of their firm:
 - I plan to stay on Orion’s platform for 5+ years
 - I am confident in that Orion’s roadmap will help grow our firm

Company Profile

The company featured in this case study asked to have its name publicly blinded because publicly endorsing vendors is against their policies.

TechValidate stands behind the authenticity of this data.

Company Size:
Small Business

Industry:
Financial Services

About Orion Advisor Tech

We exist to create technology that frees our advisors to connect with their clients and live life following their passions.

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