

Client Experience – Closing the CX Gap

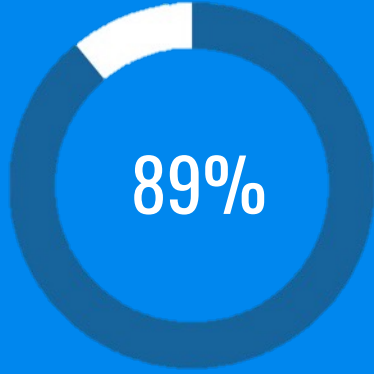
Greg Menefee, SVP Technology Consulting and Implementation

**Help Every Client to Maximize
their Orion Experience.**

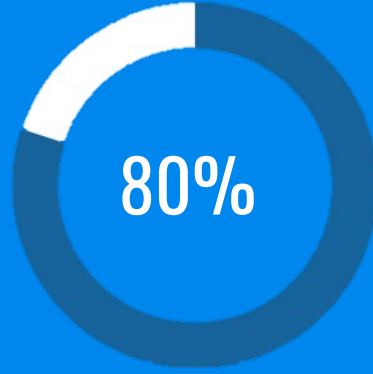


“I believe that if you can focus obsessively enough on the customer experience, then I think you have a good chance. And that’s what we’re trying to do.”

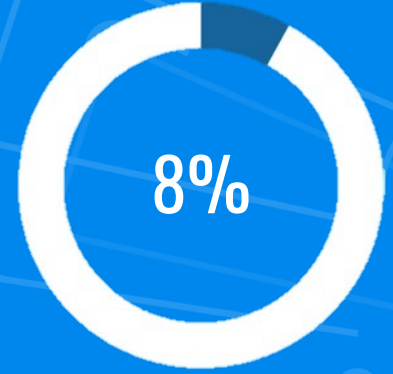
- Jeff Bezos 1999



Will compete based
on client experience



of CEOs believe they
deliver a superior
client experience



Customers feel they
received a superior
client experience

EXPERIENCE

End Client

Team Member

Firm



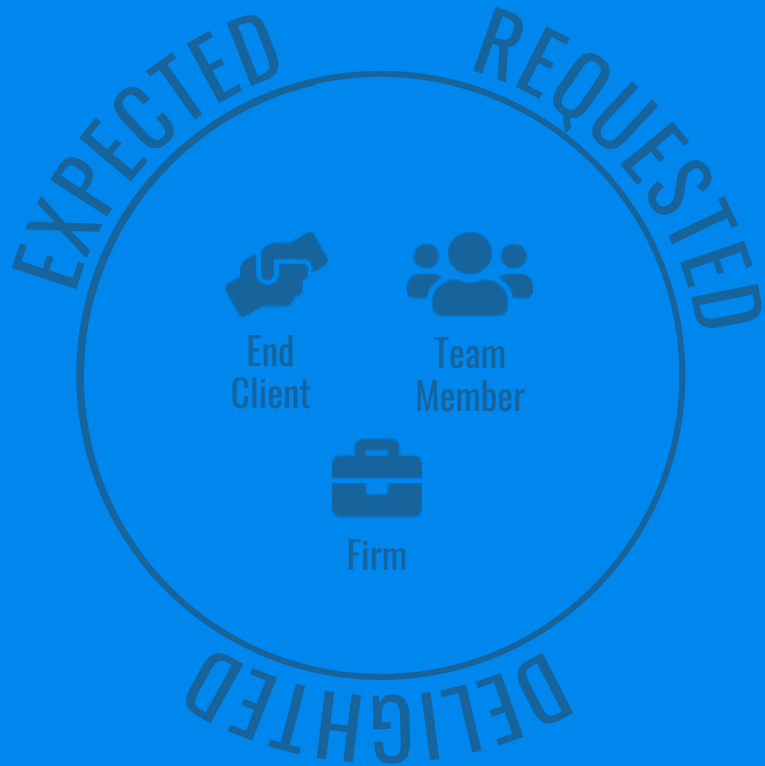
End
Client



Team
Member



Firm



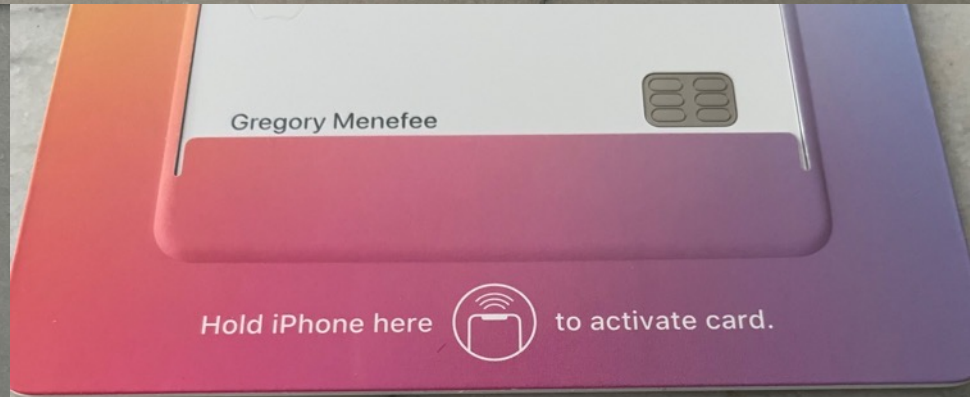
Expected

Requested

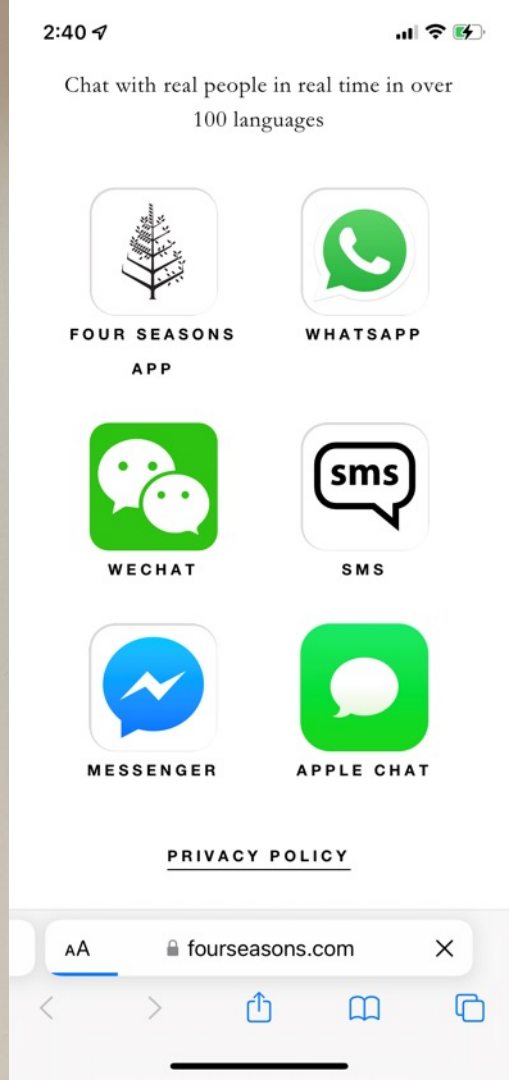
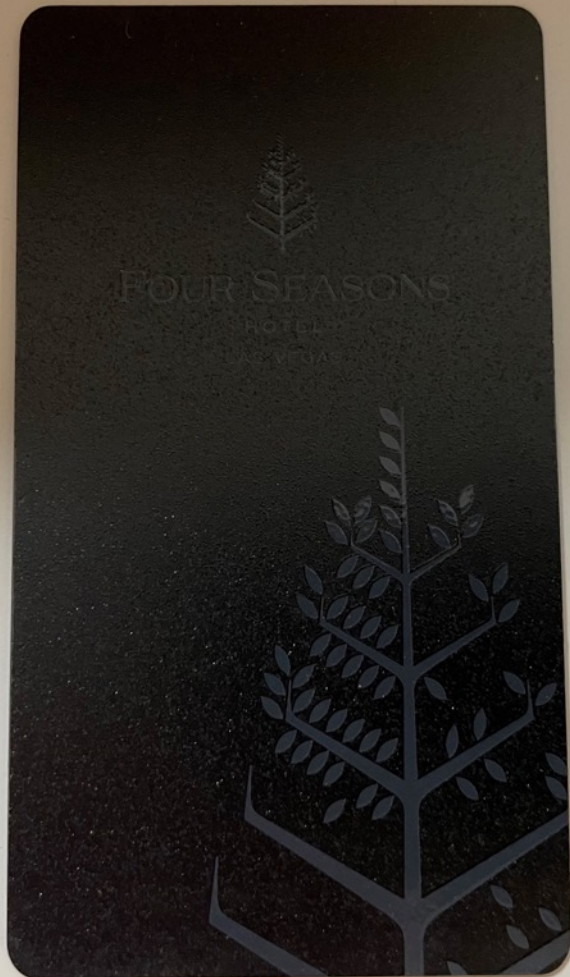
Delighted



Hold iPhone here  to activate card.



Hold iPhone here  to activate card.

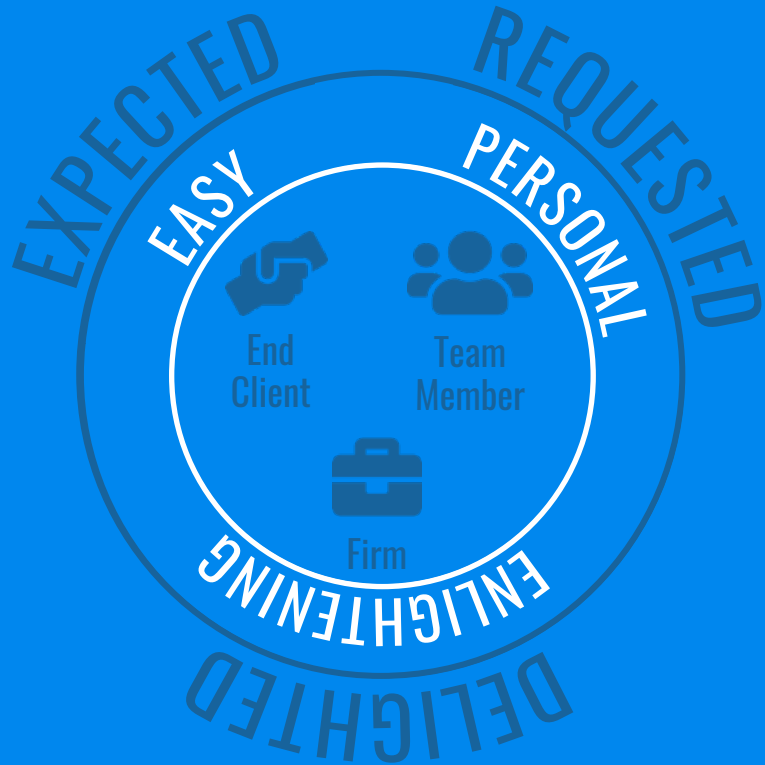


Brian,

A WARM *welcome*

FONDLY, ARCHER'S
HOSTS!





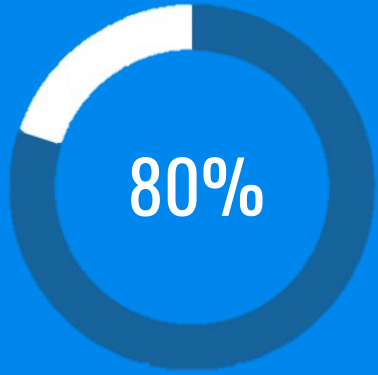
Easy

Personal

Enlightening

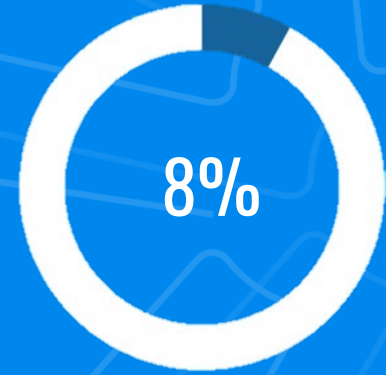


Source: Yastrow, S. (2010, January 1). Brand Harmony: Achieving Dynamic Results by Orchestrating Your Customer's Total Experience (1st ed.). SelectBooks.

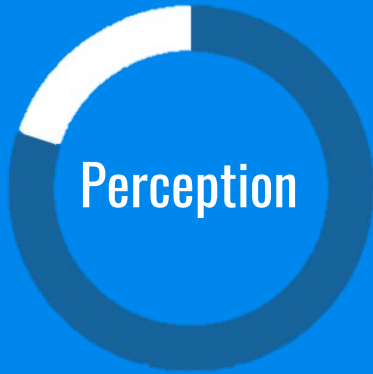


Culture

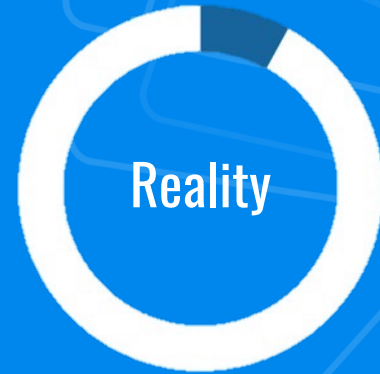
Vision
Mission
Values
Human Capital
Artificial Harmony
Feedback



Strategy

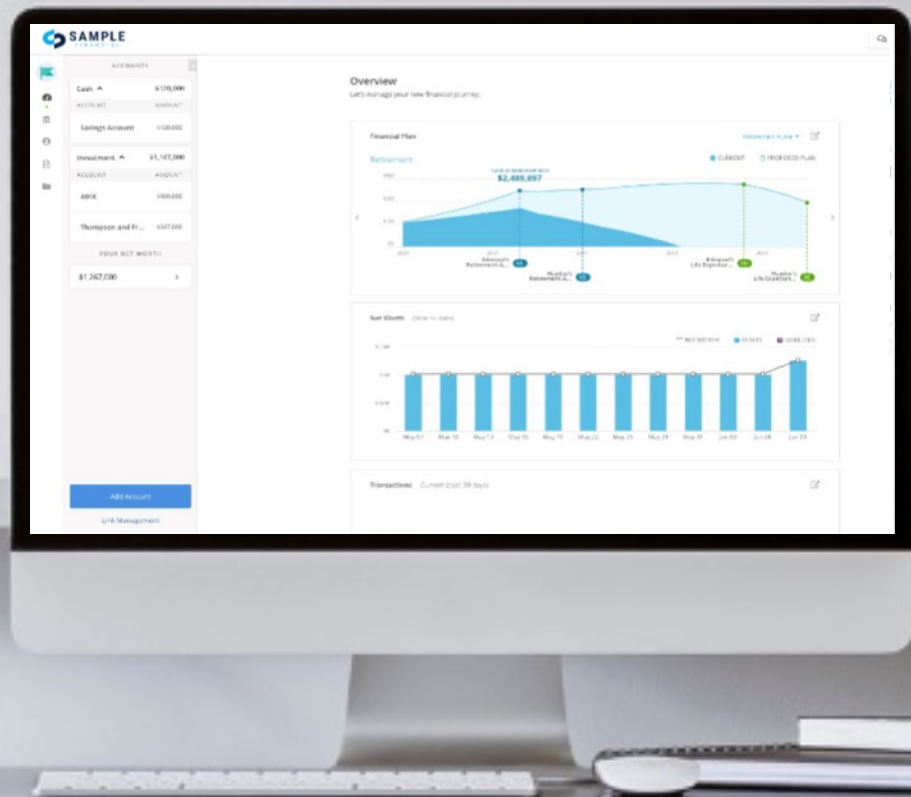


Reality



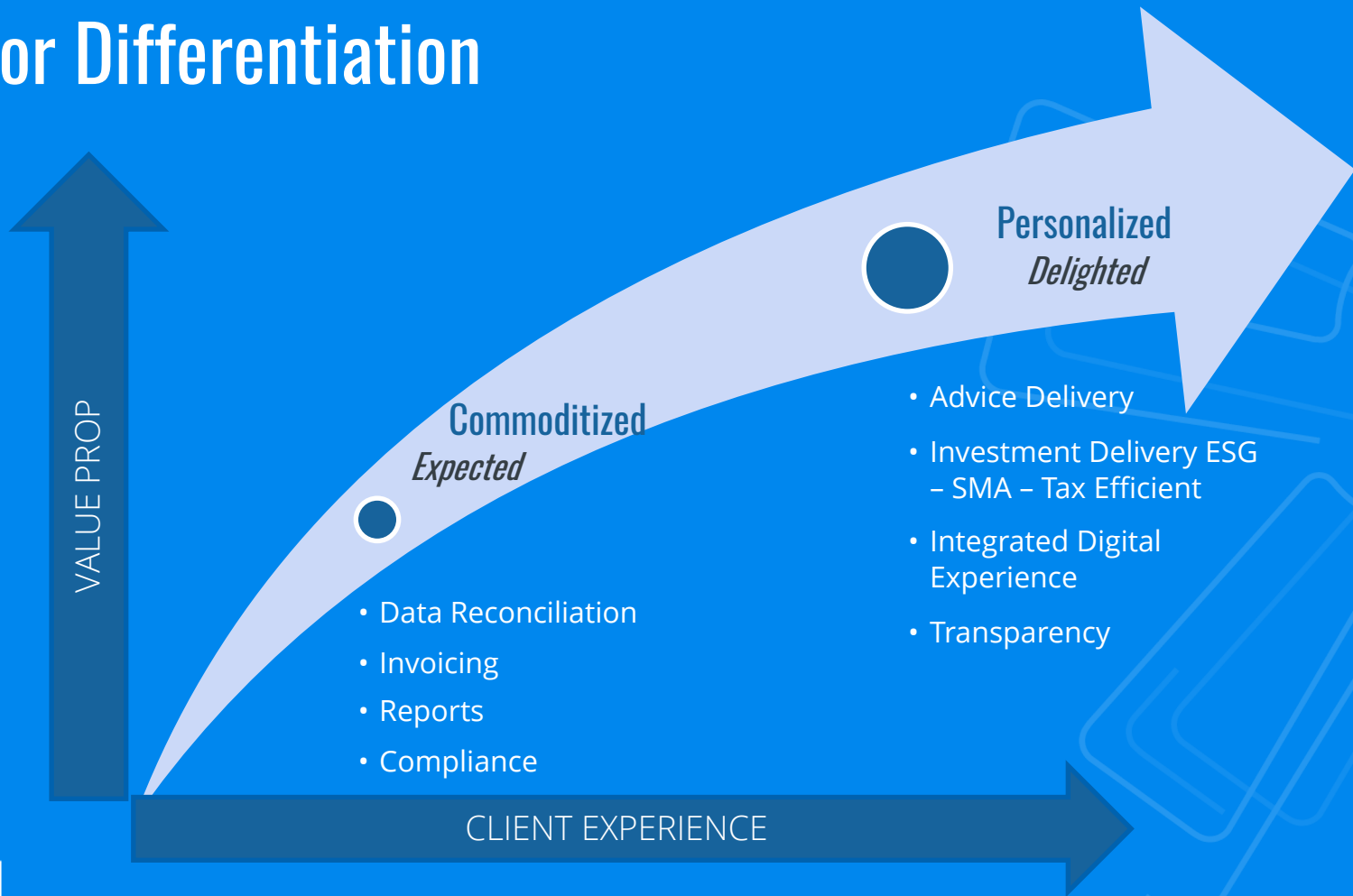
Process & Technology





A

Advisor Differentiation





PROSPECT

- Cash & Credit
- Custom Indexing Strategies
- Redtail
- Orion Risk Intelligence
- 3D Risk Profile
- Redtail Campaigns



PLAN

- Orion Planning
- Protect, Live, Dream
- Automated Account Solution



INVEST

- Eclipse
- Orion Risk Intelligence
- ASTRO
- Custom Indexing Strategies
- Communities



ACHIEVE

- Orion Core Suite
- Orion Practice Management
- Orion Compliance
- Redtail CRM

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obsessively enough on the
customer experience, then I
think you have a good chance.
And that’s what we’re trying to do.”**

- Jeff Bezos 1999

“The No.1 thing that has made us successful by far is obsessive compulsive focus on the customer as opposed to obsession over the competitor.”

- Jeff Bezos 2019





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- Jeff Bezos 2019



#ElevateEverything

