

Practifi Sandbox

To be a leading firm in the industry you need technology that moves as quickly as you do. Practifi Sandbox helps fuel your technology evolution.

While many firms struggle to test and implement new solutions due to strict regulatory requirements, the high cost of risk and lack of flexible technology, Practifi Sandbox provides a safe environment for your teams to implement creative solutions securely and sustainably.

To learn more, get in touch with a member of our team today.

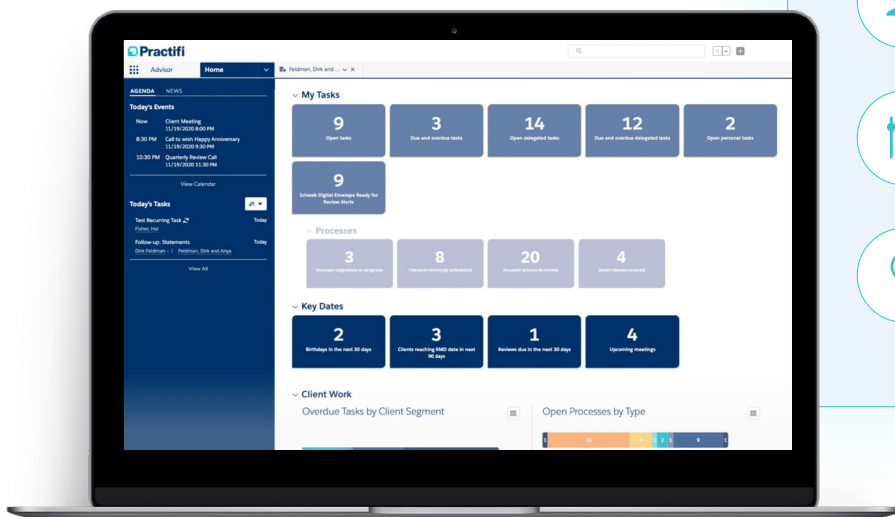


A safe place to test, train and innovate.

Today's fastest growing wealth management firms manage their technology strategically and use it as a foundation for growth. They're focused on implementing new digital capabilities, deepening existing client relationships, increasing the penetration of digital tools, driving operational efficiency and delivering actionable insights. To do this, they're building best-in-class technology solutions and IT operating models that are efficient, scalable and flexible.

However, many firms still struggle to efficiently upgrade and implement new solutions due to strict regulatory requirements, the high cost of risk, and lack of flexible technology. As a result, innovation stalls and over time, the business fails to keep up with both client and advisor expectations.

A solution to this is to introduce a secure, regulated environment for teams to test technology upgrades, experiment with new customizations and facilitate team training. Practifi Sandbox fuels innovation by providing teams a safe place to unleash creativity and implement innovative solutions. As a result, firms offer superior services, manage risks more effectively and create new opportunities.



Train Teams Quickly



Manage Risks Effectively



Create New Opportunities

Fuel your technology evolution.

Although there's no one-size-fits-all technology solution to scale wealth management firms, there are options that can help get you there. Practifi Sandbox makes it possible to upgrade your performance optimization platform safely, test new customizations before implementation and help teams facilitate training in an isolated environment separate from your core platform.

To be a leading firm in the industry, you need technology that moves as quickly as you do. Practifi Sandbox provides an agile environment to fuel innovation, all while offering the security, transparency and flexibility your firm needs to implement creative solutions safely. With full, partial and developer pro sandbox options, there is a solution to suit a variety of needs.

✓ Full Sandbox

Upgrade technology seamlessly with the most comprehensive copy org for end-to-end testing. Ideal for large scale customizations or upgrades.

✓ Partial Sandbox

Train teams quickly with a reduced data capacity org to test minor updates intermittently. Ideal for small scale testing and training.

✓ Developer Pro Sandbox

Fuel innovation with an environment made for custom development. Ideal for unleashing creativity and testing new ideas in a non-production org.

"The Practifi Sandbox environments form a critical part of our delivery cycle because we have the ability to test and refine enhancements prior to releasing updates into our production environment, ultimately resulting in seamless roll-outs and increased product adoption."

NARELLE HOWARD
CRM LEADER - MERCER

Get started today.

Contact a member of our team to get started with Practifi Sandbox today.

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