

NEWS

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The Oasis Group and Practifi Release White Paper on CRM Selection in Wealth Management

Leading industry research provider and CRM platform partner to deliver practical roadmap for financial advisors beyond the build-vs-buy decision

FORT MILL, SC (February 11, 2026) – [The Oasis Group](#), a leading consultancy for the wealth management industry, recently released a new white paper titled [‘CRM Selection in Wealth Management: Beyond the Build-vs-Buy Decision’](#), sponsored by [Practifi](#), a CRM built specifically for the wealth management industry.

The white paper reframes CRM decisions for financial advisory firms around implementation timeframes, workflow alignment, and long-term data architecture, rather than relying on feature checklists alone. It highlights how CRM selection in wealth management has evolved beyond the traditional build-versus-buy debate into three distinct paths: generic enterprise platforms, niche wealth management CRMs, and purpose-built solutions that aim to combine the strengths of both.

“Too many wealth management firms still approach CRM as a technology choice rather than a strategic business decision,” said **John O’Connell**, founder and CEO of The Oasis Group. “Our experience shows that 75% of CRM implementations fail not because of the software itself, but because of rollout strategy, data architecture, and change management missteps. The firms that win are the ones that treat CRM as the operational hub of the business, implement in phases, and build the unified data foundation that AI will require.”

The white paper outlines a three-phase implementation framework designed to reduce CRM failure rates and deliver measurable value at each stage. In the Foundation phase, firms establish core data architecture and essential workflows; in the Automation phase, they standardize and automate the top three mission-critical workflows; and finally, in the Integration phase, they scale integrations, reporting, and AI-ready analytics on top of a unified data model.

Three mission-critical workflows where CRMs create tangible business value are central to the paper's recommendations:

- **New client onboarding**, where standardized, CRM-enabled workflows reduce friction, shorten onboarding timelines, and support higher first-year retention.
- **Activity tracking and follow-up management**, where systematic logging and reminders transform client service from individual memory to firm-level capability and strengthen compliance oversight.
- **Client review preparation and execution**, where automated data aggregation and agenda creation can save advisors three to five hours per review while improving perceived service quality.

“We worked with The Oasis Group on this research because firms need practical guidance, not another feature comparison. said **Adrian Johnstone**, CEO of Practifi. “By highlighting the real cost of customization and emphasizing phased implementation and unified data, this framework shows how advisory firms can move beyond CRM frustration and build an operational foundation that supports scale, consistency, and AI-driven growth.”

The insightful white paper, [which can be downloaded for free on The Oasis Group's website](#), builds on The Oasis Group's broader body of research and education on technology and AI in the wealth management industry, including its [Peaks Research](#) reports on key wealthtech providers, its library of in-depth [white papers](#), and its library of [informational webinars](#), which translate these insights into practical guidance for advisory firms.

To download the white paper on CRM Selection in Wealth Management, sponsored by Practifi, [please click here](#).

ABOUT THE OASIS GROUP

The Oasis Group is a leading consultancy in the wealth management industry. The Oasis Group offers award-winning consulting services, industry-leading research, and artificial intelligence assessment and education for wealth management firms and the service providers who serve the wealth management industry. With extensive leadership experience in both emerging businesses and mature, established organizations, founder John O'Connell and his team are passionate about helping financial services and technology firms solve their most complex technology and sales challenges, while staying focused on their clients, understanding the market and competition. To learn more about The Oasis Group, visit www.TheOasisGrp.com.

ABOUT PRACTIFI

Practifi is the only intelligent CRM built specifically for wealth management firms. Designed to support the way advisory teams actually work, Practifi combines native AI functionality with purpose-built capabilities across client management, business operations, compliance support, and firmwide collaboration. Together, these features help advisory teams streamline operations, surface

meaningful insights, and strengthen client relationships without sacrificing the human experience at the center of advice. Learn more at www.Practifi.com.

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