Mariner

A case study on HR, legal & compliance management

OVERVIEW

Rapid growth comes with added complexity, especially for Mariner Wealth Advisors Human Resources department, which provides recruiting, onboarding, payroll, benefits, and strategic consulting services to the companies operating entities across the nation. This growth necessitated an ability to scale quickly and connect the pieces among our different organizations. Onspring provided not only solutions to fit their legal, compliance, and risk management needs, but a platform to create new workflows and reporting for human resources and marketing that would all live in one central tool.

2

'out-of-the-box' Onspring solutions used

3+

new workflows and reports created by Mariner in Onspring

PROFILE

Company:
Mariner Holdings

Industry:
Financial Services

Reach:
41 offices across the U.S.

Size:
575 employees

Solutions:

- Corporate Counsel
- Risk Management
- Created by Mariner:
  - Marketing Program
  - Organizational Hierarchy
  - Human Resources

Onspring

CHALLENGE

To help keep up with the volume of new hires, ad hoc HR tools had been added over time. Human Resources was stuck trying to manage multiple HR tools, websites, and redundancies. The team began looking for an enterprise content management system and discovered Mariner's in-house legal counsel was engaged in a similar search, the two departments joined forces to explore technologies that could satisfy the needs of everyone.
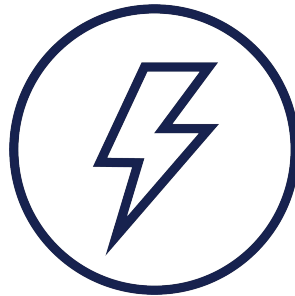
Human resources

Organize personnel files & employee data

Accept file and image attachments

Keyword search functionality

Performance management reporting or goal tracking

Marketing

Internal literature collaboration

Material distribution to clients

Security

Restrict users by IP range

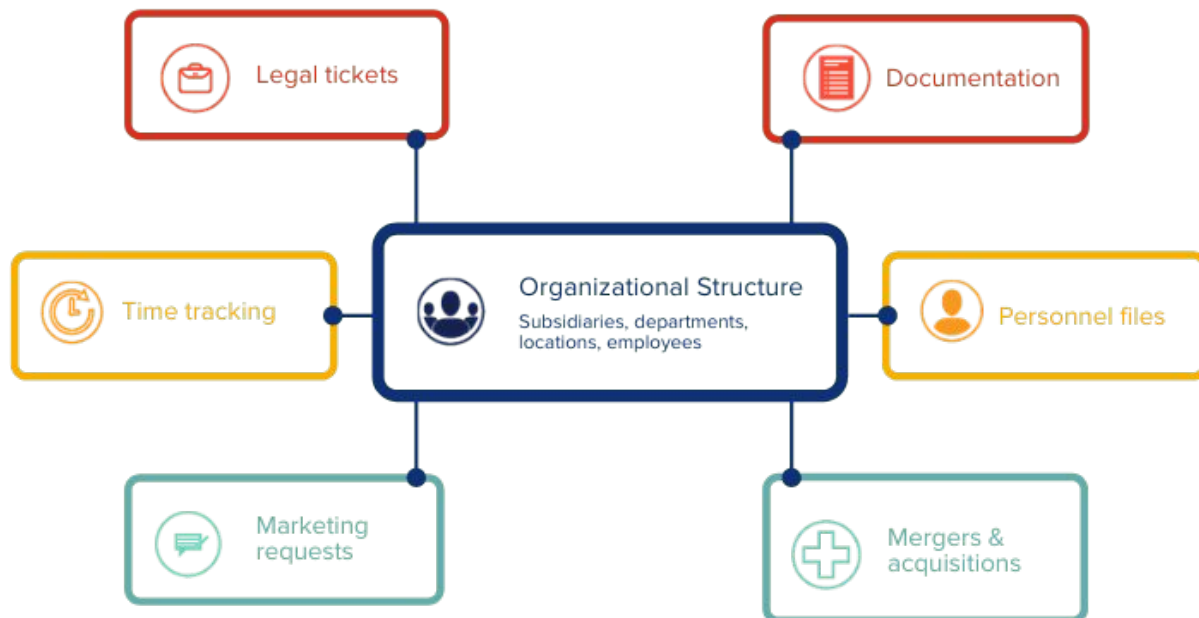Two-factor authentication for system administrators

SOLUTION

No technology platform Mariner reviewed could deliver on the unique needs of each individual team at Mariner, except Onspring.

> *"We knew we needed to build something different. A one-size-fits-all product was not going to work for us. What we found in Onspring was the flexibility we needed to bring together HR, legal, compliance, and marketing in one interconnected tool."*
>
> *– Human Resources Manager*

The general counsel and risk management solutions from Onspring could immediately deliver on the needs of the in-house legal team. Human resources and marketing teams partnered with the Onspring professional services team to create custom workflows, reporting, and dashboards in the platform. Everyone started utilizing the platform with exactly what they needed and it was all interconnected in one central place.

Creating a custom human resources solution

After first working with Mariner to identify business requirements and inputs from stakeholders, the Onspring team designed a series of process workflows to minimize the amount of overhead needed from the human resources team. With final agreement on the design, Onspring configured the process in the platform using simple drag-and-drop functionality.

Flexibility is critical for any new hire at Mariner, so the team was pleased to find Onspring employees were just as flexible and adaptable as their own.

> *"They came in and listened to our needs and didn't try to fit us into a pre-configured solution. We never felt like Onspring was trying to sell us. They've been genuine from day one."*
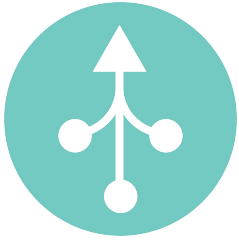>
> *– Human Resources Manager*

Paid Time Off Workflow

A new automated workflow improved efficiency for submissions and tracking of employee paid time off (PTO)requests.

- Employees submit PTO requests in fields
- Accrual calculations display available and used PTO per employee
- PTO requests route to department heads for permissions
- Access control set for individual users to establish read, update and delete rights

RESULT

A truly interconnected tool with flexibility to bring together human resources, legal, compliance, and marketing effortlessly.
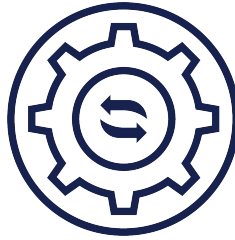
Centralized repository

All human resources content for employee access (e.g. healthcare, 401(K), policies, holiday schedule)

Marketing campaigns, leads, and contacts

Legal reviews, revisions and approvals

Automated workflows

PTO requests/usage routed through a documented approval process

Onboarding & offboarding conducted systematically, meeting security standards

Marketing requests route through legal with tracking, prioritization, and deadlines

Performance reporting

Marketing campaigns report lead generation and revenue potential

HR tracks PTO usage and requests available by employee

Legal measures requests by volume, time horizon, marketing campaign, and compliance initiative

ABOUT ONSPRING

Onspring is a cloud-based, no-code platform for reporting, analysis, process management and coordination. Our connected solutions for Governance, Risk & Compliance, ITSM, and Business Operations create efficiencies for your teams and put key metrics at your fingertips—anytime and everywhere. Get started with our solutions in days, not months, and easily tailor them to your requirements.

With Onspring, you're in control. Learn more at **onspring.com.**

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