

Global financial services firm Mariner selects NetDocuments for enterprise content management integrated with Salesforce.com

Mariner, the parent company to 31 separate global financial services partner firms has chosen NetDocuments for native cloud-based document and email management embedded within Salesforce.com



Mariner, a leading global financial services firm, has announced the selection of NetDocuments for cloud-based document and email management which also integrates with Salesforce.com's Customer Relationship Management (CRM) platform. With 31 partner firms worldwide, the company sought a solution that would not only combine a best-in-class security and compliance infrastructure, but also a solution that would meet the mobility, usability and productivity needs of their personnel utilising Salesforce.com's cloud-based CRM platform.

"One of our partner firms had already been using NetDocuments, based on their positive recommendation we included them in the vendor selection process," Jonathan Butters, SVP, Technology Solutions & Business Intelligence at Mariner, stated. "Security and compliance capabilities were minimum requirements, as was a Salesforce.com integration. When we saw NetDocuments had world-class collaboration tools too, it became clear to us that NetDocuments is the ideal solution for our firm."

John Martucci, Sr. Account Manager at NetDocuments commented, "It's truly exciting to see cloud-to-cloud integrations like NetDocuments and Salesforce.com that combine critical applications to improve security, processes, and overall efficiency for a company. Cloud adoption continues to disrupt the traditional on-premises software delivery model, and we're thrilled to be attracting and adding leading legal, financial and professional services firms like Mariner to NetDocuments' active customer community."

Mariner's partner firms are largely comprised of wealth management and capital advisory firms, making client collaboration, built-in mobility and a seamless integration with Salesforce.com critical. Mr. Butters continues, "With built-in collaboration tools like Secure Document Delivery and ShareSpaces, our advisors can safely share and receive sensitive information with their clients. This collaboration, coupled with the improved efficiency and information governance we get by using NetDocuments inside of Salesforce.com, will enable us to ultimately operate more efficiently in a secure and compliant way that also improves the service we offer our clients."

[To read more about the Tikit NetDocuments partnership click here.](#)

[Or, to find out how more and more firms are choosing NetDocuments click here.](#)

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