

A decorative graphic consisting of a network of interconnected nodes and lines, rendered in shades of blue and orange, spanning across the middle of the page.

CASE STUDY
MULESOFT IMPLEMENTATION FOR A
FINANCIAL ADVISORY COMPANY

CLIENT OVERVIEW:

This company is composed of a community of financial advisors aligned to provide objective, comprehensive wealth support for their clients. They provide financial advice to help clients build better lifestyles, achieve their dreams and create long-term stewards of wealth.

CLIENT PROFILE:



LOCATION:
US State



EMPLOYEES:
150+



INDUSTRY:
Financial Services



SOLUTIONS:
MuleSoft CloudHub

CASE STUDY: MULESOFT IMPLEMENTATION FOR A FINANCIAL ADVISORY COMPANY

CHALLENGE:

The client was attempting to create a seamless, API-based set of services to integrate with one of the country's largest financial trading partners to enable rapid transaction processing for clients. The integration framework had to allow for easy reusability and messaging with other applications within the client solution sets. In addition, the solution also had to be flexible to enable the client to quickly implement other messaging solutions to support their initiatives that expand products and services to their clients.

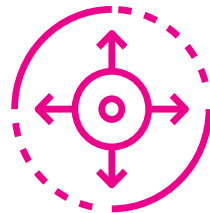


“Integrations are created in days to weeks, not months to years.”

SOLUTION:

After a vendor evaluation, CleanSlate:

- ◆ Selected and implemented the the MuleSoft CloudHub to adhere to their strategy for API-led integrations
- ◆ Leveraged the MuleSoft messaging framework using System, Process and Experience APIs to enable inbound and outbound processing of financials
- ◆ Produced templates to allow easy transaction processing with future trading partners
- ◆ Established common services to release into the messaging gateway for rapid deployment and inclusion into future API development efforts to address those gaps and risks



RESULTS:

The first round of mission-critical integrations was identified, designed and developed over the course of less than a month. This allowed a scalable influx of financial transactions to process that would have otherwise been waiting in a batch processing que for an extended point-to-point solution; resulting in instant revenue for the client and investment returns for customers.

The framework created from this first round of integrations established a set of templates that will now be leveraged for all future development efforts, leading to API-solutions that may be configured and deployed in sprints of less than 2-weeks' time.

The out-of-the-box adapters deployed with MuleSoft allow the client to easily create integrations with its SaaS applications to further enable business transactions and open new reporting and transparency to its clients and partners.