EXAVALU
STRATEGY • TECHNOLOGY • INNOVATION

Success Story

Salesforce + MuleSoft: Legacy Integration Modernization Made 2X Faster

Objective

A leading US self-insured workers' compensation provider wanted to implement CRM capabilities and an insurance policy administration system for its Defense Base Act (DBA) and Longshore products on the Salesforce platform. However, their member data was dispersed across multiple legacy back-end systems which complicated data integration, infrastructure optimization, API governance, and event logging and tracking.

They partnered with Exavalu to develop a solution using both Salesforce and MuleSoft to ensure robust and architectural governance, critical for user adoption and maximizing value realization.

Service Offered

- Advisory
- Implementation

Challenges

Our client constantly struggled with dispersed data (member, policy, and claims) across multiple systems, leading to inconsistencies and inefficiencies. Salesforce adoption was significantly low among underwriters and Member Service Representatives (MSRs), which caused data integrity issues. Manual processes for longshore and DBA workflows- including quoting, binding, invoicing, and payroll processing – slowed down operations and increased errors.

Additionally, a lack of documentation led to process gaps, making solution modifications difficult. The Salesforce environment was completely out of sync, lacking a baseline code version, and the MuleSoft implementation led to inefficiencies, hampering integration.

Our client faced significant challenges in bridging the integration gap between Salesforce and their Member Management System (MMS), maintaining operational APIs for legacy system integration, and ensuring transactional data reliability. Their limited in-house expertise further delayed the system transition. The gaps in API governance, disaster recovery strategies, and real-time monitoring mechanisms posed serious risks to data reliability and business continuity. Addressing these issues was critical to enhancing system reliability, data integrity, and overall business performance.

How Exavalu Made an Impact

To address these challenges, Exavalu deployed a balanced team of Salesforce and MuleSoft experts with deep insurance expertise.

We initially set up a comprehensive discovery phase to identify process gaps, performance bottlenecks, and technical constraints. Thereafter, we designed a unified data model to streamline member and policy data and leveraged best practices to accelerate the turnaround time for both new and ongoing implementations.

Our team led full-scale Salesforce implementations for DBA and Longshore products, automating quoting, binding, invoicing, payroll management, and endorsement processing to enhance operational efficiency. To stabilize the Salesforce environment, we developed deployment strategies, established a baseline code version, and created key documentation for long-term scalability.

We enhanced MuleSoft APIs to align with their unique business needs and improve integration efficiency and security. We brought in Azure Service Bus Message Queue to ensure reliable transaction execution, minimizing errors and maintaining data consistency. And finally, we strengthened API governance and disaster recovery strategies to boost system reliability, data integrity, and cross-platform interoperability.

Business Impact

- Streamlined underwriting with reduced clicks, enhancing payroll management, quoting, binding, invoicing, and endorsement.
- Established best practices for faster and smoother future rollouts.
- Improved data governance, integrity and prevention of transactional data loss, leading to enhanced data quality.
- Enhanced API management and governance through standardization and best practices.
- Promoted faster adoption of the new system with improved notification processes.
- Enabled efficient tracking of agent interactions, allowing faster service assistance.
- Facilitated proactive issue resolution for greater operational efficiency.

Metrics

30% Reduction in underwriting and policy processing time with optimized workflows and automation.

2x Faster Transition to the new system, improving agent productivity and business continuity.

30% Improvement in data accuracy and governance, enhancing decision-making and compliance.