

CriticalRiver Drives Operational Efficiency for a Leading Trust and Funding Firm with MuleSoft Integration



The Customer

A leading financial services firm specializing in trust and funding management, serving institutional clients and donors across the philanthropic and endowment ecosystem. To strengthen visibility and accuracy across its core operations, the firm needed a seamless connection between its trust management system and Salesforce CRM.

The Challenge

As the firm's operations grew, several gaps emerged across systems:

- Disparate systems with InnoTrust and Salesforce operating in isolation
- Manual data entry and updates, increasing errors and slowing workflows
- Limited visibility into real-time funding insights, affecting decision-making
- Delayed data flow impacting stakeholder access and client service

The Solution

The firm partnered with CriticalRiver to build a seamless integration using the MuleSoft Anypoint Platform. The solution:

- Synchronized funding records between InnoTrust and Salesforce
- Automated donor and account management across systems
- Enabled real-time status updates for funding records
- Strengthened data consistency and compliance across both platforms
- Improved reporting reliability for stakeholders

The Results

- Eliminated manual data entry and reduced processing time
- Strengthened data accuracy across funding and donor records
- Enabled faster access to funding insights for sales and relationship teams
- Improved cross-departmental coordination through real-time updates
- Built a scalable, API-led architecture to support future growth

Impact Delivered

- Real-time bi-directional sync between InnoTrust and Salesforce
- Automated funding and donor data flow
- Stronger data consistency and compliance

Solution Components

MuleSoft Anypoint Platform, Salesforce CRM, InnoTrust, API-Led Integration Architecture

The Conclusion

Through CriticalRiver's MuleSoft integration, this leading trust and funding firm automated the flow of funding and donor data between InnoTrust and Salesforce. Real-time synchronization has eliminated manual inefficiencies, strengthened data accuracy, and given stakeholders faster, more reliable access to critical funding information, positioning the firm for stronger client service and continued growth.