



### Brief on Berkadia

#### **1:1 Meeting with Berkadia Leadership - Leaders participating:**

1. [Andrei Chursov - Senior Vice President, Transformation, Berkadia](#)
2. [Bryce Nyberg - VP - Product Strategy & Corporate Development, Berkadia](#)
3. [Praveen Polavaram - CFO & Site Director - Berkadia, India](#)

#### **Information Classification: CONFIDENTIAL (YOUR EYES ONLY)**

Berkadia, a joint venture between Berkshire Hathaway and Jefferies, is a leading player in commercial real estate services. Their operations span three primary verticals:

1. **Mortgage Banking** - Origination and financing of multifamily and commercial loans through Fannie Mae, Freddie Mac, HUD, and private capital sources.
2. **Investment Sales** - Advisory and brokerage services for buying and selling commercial properties, supported by proprietary market analytics.
3. **Loan Servicing** - One of the largest non-bank servicing portfolios in the U.S.,

#### **Strategic Focus**

Berkadia's leadership is currently focused on increasing productivity and process visibility, particularly through AI, workflow optimization, and intelligent automation.

Their goal is to "*do more with less or the same*" - optimizing how people, data, and technology come together to drive business performance.

#### **Key areas of interest include:**

- Process Intelligence & Automation - Visibility into how work moves across systems like Salesforce, Excel, mainframes, and email; identifying inefficiencies and automating repetitive workflows.
- AI for Workflow Optimization - Predictive process alerts, automation triggers, and AI copilots that recommend the next best action or automatically resolve common process bottlenecks.
- Data Integration & Decision Intelligence - Unified dashboards that aggregate structured and unstructured data for faster, more accurate decision-making.

- Workforce Productivity & Collaboration Tools - Tools that enhance how teams execute tasks across systems, improve collaboration, and reduce manual handoffs.
- Unstructured Data Intelligence - Natural Language Processing (NLP) or GenAI models that can extract process steps, status updates, or risk indicators from emails, documents, and chat conversations.

## **Why This Matters**

Systems run on multiple systems that don't communicate seamlessly - ex: Salesforce for loan origination, Excel and mainframes for servicing, and email for internal communication.

This disconnection leads to:

- Manual rework and duplicated effort
- Inconsistent reporting and delays
- Poor visibility into "what's happening where"
- Limited ability to scale automation

Berkadia is looking for scalable, enterprise-grade AI and workflow solutions that can cut through this complexity and build a connected, intelligent operations layer.

## **The Opportunity for Startups**

**Startups participating in these discussions should focus on how their technology can bring visibility, speed, and intelligence into enterprise operations.**

**Potential impact areas include:**

- AI copilots that simplify decision-making for internal teams
- Process-mining tools that uncover bottlenecks hidden in workflows
- Automation platforms that orchestrate tasks across tools and people
- Smart document and email parsing engines that turn unstructured communication into trackable, auditable workflows



- Workforce intelligence solutions that measure and improve digital productivity

### In Summary

**Berkadia is seeking enterprise-ready AI and workflow startups that can enhance visibility, reduce manual rework, and empower teams across functions with automation and insight.**