

COMMERCIAL REAL-ESTATE FINANCE

Bringing loan servicing back into the system for a commercial real-estate lender

Much of the servicing journey ran outside any system: in email, spreadsheets and mainframe screens. Wexa designed one automation layer that monitors mailboxes, tracks every step on a timeline and automates boarding, escrow, investor reporting and payoff.

6

servicing processes in scope

4

system types connected: CRM, mainframe DBs, spreadsheets, email

Step-level

timeline for every loan

CLIENT

Large US commercial real-estate lender and loan servicer

REGION

US

WHEN

2025–2026

ENGAGEMENT

Solution design

WEXA COMPONENTS

Connectors (CRM, mainframe, spreadsheets, email) · email orchestration · process flows · context graph

The challenge

- "The whole journey of that unit right now is outside the system."
- Email as the process bottleneck
- Manual aggregation across CRM, spreadsheets, email and mainframe databases

What Wexa built

- ✓ Mailbox monitoring, email parsing, auto-replies, approval tracking and SLA escalation
- ✓ Timestamped step-level timeline per loan, including dead-deal tracking
- ✓ Loan boarding, payment exceptions, escrow (tax sites and insurance documents), investor reporting, payoff letters, assumption coordination
- ✓ Phased rollout with a no-code studio for the operations team

How it runs on Wexa

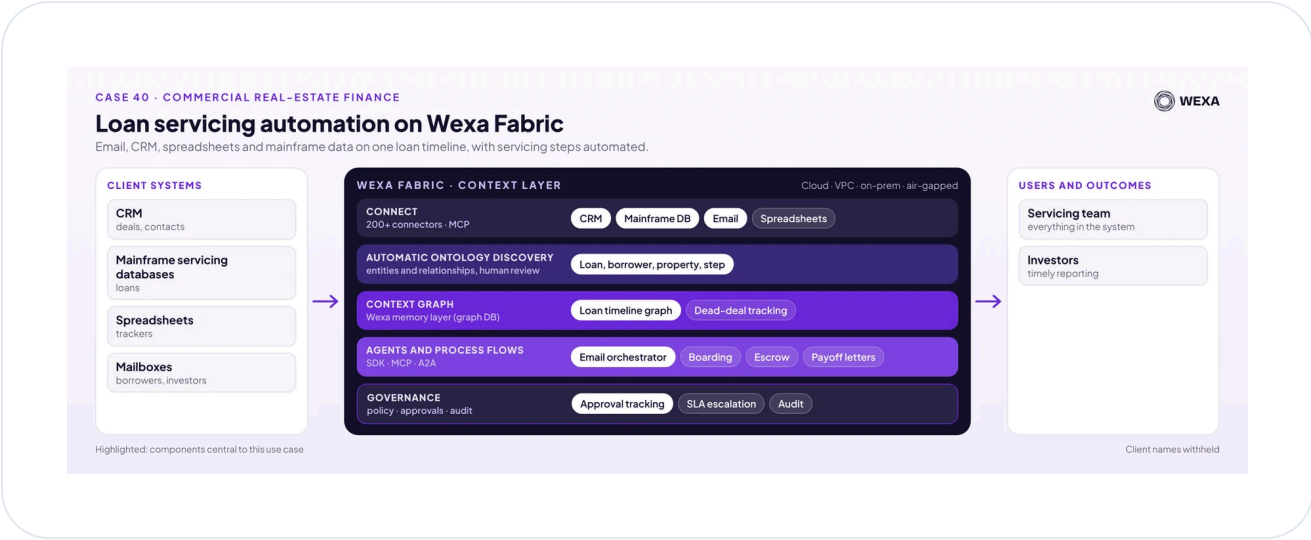


FIGURE How this use case runs on Wexa: client systems connected, ontology discovered, context graph in the Wexa memory layer, agents and process flows, and governance. Highlighted components are central to this use case.

Solution architecture

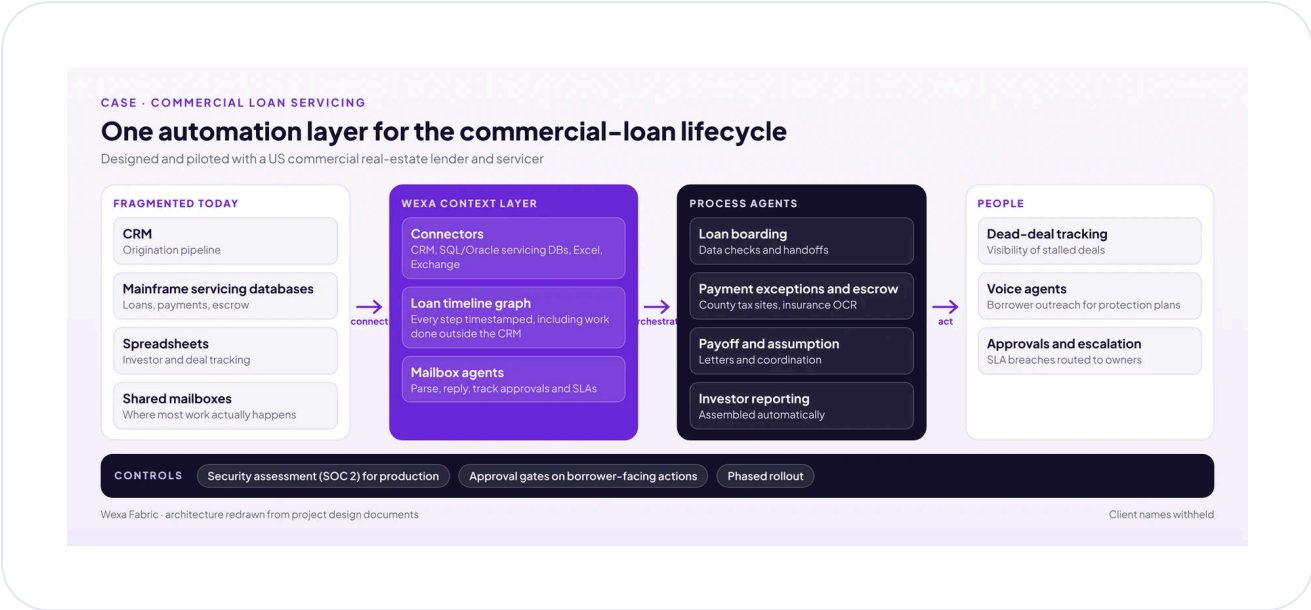


FIGURE Loan-servicing automation architecture (redrawn from the project design).

Orchestration layer

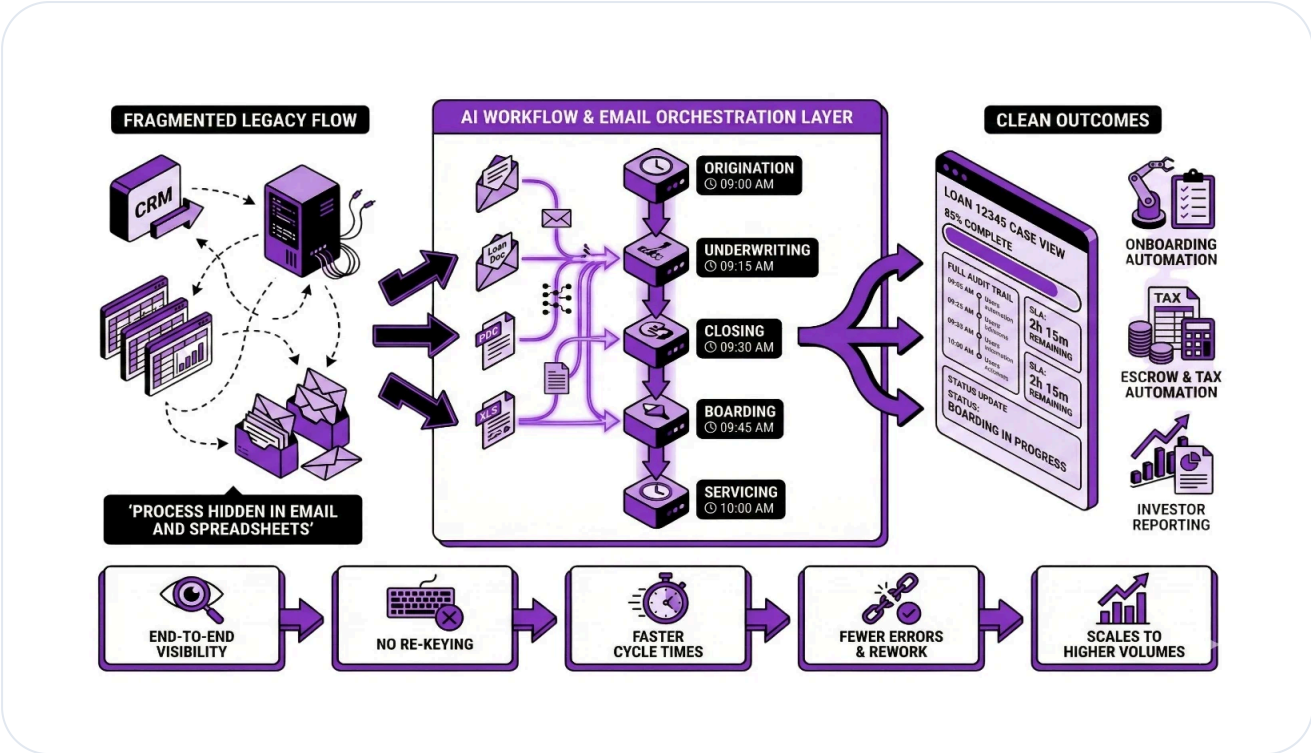


FIGURE AI workflow and email orchestration layer across the loan lifecycle.

Results

MEASURE	BEFORE / WITHOUT WEXA	WITH WEXA
Servicing operations staff	120 staff	75 staff
Annual cost of the process	\$10.2M	\$6.4M
Time to implement the AI solution	9 months	16 weeks
AI build cost (one-time)	\$1.2M	\$177K

MEASURE	BEFORE / WITHOUT WEXA	WITH WEXA
AI operating cost per year (models, infrastructure, upkeep, platform)	\$704K	\$336K
Total AI cost in year 1	\$1.9M	\$513K

WITH WEXA

\$3.5M

net annual value to the client after Wexa's
own operating cost

2x

faster to implement

52%

lower AI operating cost

\$1.3M

less AI spend in year 1



**"We have to comb through a bunch of disparate
systems, email included."**

SERVICING LEADERSHIP, CLIENT

Introduced through a corporate innovation programme (October 2025); mutual NDA
and proposal in December 2025.