



### Birdsey Group Company Profile

- LoanLogics customer since July 2016.
- Birdsey Group Residential specializes in due diligence third party services.
- Headquartered in Atlanta, Georgia with offices located in Dallas, TX and Irvine, CA.
- Services all 50 US states plus Puerto Rico and Guam.
- Birdsey Group Residential LLC is a subsidiary of Birdsey Group LLC and can be found online at [www.birdseygroup.com](http://www.birdseygroup.com).

## Case Study – Birdsey Group

LoanHD® Clarity in Loan Commerce.™

“Since partnering with LoanLogics we have seen tremendous productivity lifts, which have enabled us to more than double productivity.”

*Todd Grashaw, Managing Director*

### The Challenge

Founded in 2004, Birdsey Group is a national real estate consulting firm providing specialized services to the Real Estate Investment and Finance industries. Their breadth of consulting services includes loan origination support, asset management, highly structured securitized transactions, B-Piece underwriting, as well as agency and commercial mortgage-backed securities (CMBS) loan assumptions. Birdsey Group Residential LLC is a wholly owned subsidiary of Birdsey Group specializing in third party due diligence services and post-close quality control. Their diverse set of customers includes loan originators, Real Estate Investment Trusts, loan servicers, and purchasers of mortgage loans and mortgage servicing rights.

As a result of Birdsey Group's rapid business growth in residential due diligence, combined with increasing investor, regulatory and compliance requirements, the need for flexible, automated and compliance driven quality control (QC) technology became apparent. Too much time was spent on internal manual processes. A better technology alternative was needed. A technology solution that would be able to scale with the business, enable greater productivity, plus have flexibility in order to manage excess capacity. Birdsey Group was looking for a partner who could provide innovative technology that would help them meet and exceed their growth goals and service level standards cost effectively. Several QC technology companies were evaluated, but only one particular company met every requirement, and had a substantial competitive advantage.

### The Solution

In July 2016, Birdsey Group became a LoanHD® platform technology customer. “The LoanHD® platform had the powerful functionality that could help us grow our business. We evaluated several QC technology vendors but based on our needs and LoanLogics’ scope of capabilities, no other company came close”, stated Todd Grashaw, Managing Director, Birdsey Group Residential. This differentiated technology is now playing a critical role in the success of Birdsey Group Residential's strategic growth initiatives! Scalability and automation combined with the flexibility to take advantage of audit services from

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“Other companies were not only lacking in features and functionality but they could not offer indexing, data extraction and comparison features offered by LoanHD®. LoanLogics clearly had the competitive advantage.”

*Todd Grashaw – Managing Director*

LoanLogics provides higher accuracy and faster turn times at lower internal costs.

When performing due diligence services for their customers, Birdsey Group Residential has found that their ability to audit loans faster and with best in class quality analysis is significantly attributable to the efficiencies created using the LoanHD® technology.

Key functionality important to Birdsey Group Residential includes:

- Granular indexing, versioning, data to document and document to document comparisons
- Ability to run large number of business rules on data extracted
- Real-time loan-level dashboards
- Automatically populated audit worksheets reduce manual data entry
- More accurate and faster TRID reviews
- Real-time rebuttal process
- Clean and customizable reporting

Since implementation there has been a considerable productivity lift enabling more files to be audited per day without sacrificing quality. “Our customers tell us all the time how much they like how

clean and efficient our reporting and rebuttal capabilities are, which provides a significant competitive advantage over other vendors in the industry”, stated Todd. The LoanHD® platform has enabled Birdsey Group Residential to exceed customer SLAs and surpass growth objectives!

### The Result

The decision to partner with LoanLogics continues to pay off. The LoanHD® platform provides automation and scalability, enabling more efficiency and flexibility to manage capacity. As an example, Birdsey Group Residential was able to meet a large customer’s SLA, with a very compressed timeline, that required a file review of more than 600 loans within a two week timeline and only five days to clear rebuttals. Even with a high defect rate, they were able to meet the deadline five days early. “LoanHD® provides users the ability to upload missing documents in the rebuttal portal enabling faster, efficient, accurate results. Multiple sellers have told us this feature is a drastic improvement over a common practice of communicating results by

circulating multiple spreadsheets, which can lead to inefficient, time consuming reconciliation that is prone to error”, stated Todd.

The LoanHD® platform consistently delivers a high return on investment, meeting and exceeding all productivity expectations. From indexing, versioning and granular data extraction to automated business rules enabling exception based audits, the results have been unprecedented.

- Ability to process 7-9 loans per person per day
- Significant reduction in manual processing
- Higher data accuracy rates
- Ability to scale with the business

Birdsey Group Residential continues to embrace their strong relationship and trusted partnership with LoanLogics!

Schedule a demo today to see how LoanHD can work for you. Call us at 866.557.6959 or learn more at [loanlogics.com](http://loanlogics.com).

The game has changed.  
Play different.



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