

PhoenixTeam

We are mortgage technology.

PhoenixTeam is a women-owned small business that provides **mortgage technology solutions to improve the home loan experience for borrowers** and helps financial institutions, technology providers, and government agencies achieve their desired outcomes. With a focus exclusively on the mortgage industry, we delight clients and deliver better business solutions through technology implementation excellence, while never losing sight of our **vision to bring joy and purpose to software development.**

Our team **uses empathy and service to deliver value at enterprise scale with mortgage and banking technology.** That is our mission. We thrive on tackling the most challenging problems while still **staying true to our values.**

We keep promises. We meet schedules. We own our results.

Our "Special Sauce"

At Phoenix, we embed ourselves as trusted members and advisors within our clients' ecosystem. We are an intellectually curious group of folks who are constantly learning from industry thought leaders as well as our unique experiences with our clients. We leverage that knowledge to develop value-driven, creative alternatives and techniques to solve our clients' hardest problems and apply those techniques to meet our clients' goals. This is our "special sauce."

We deliver better mortgage technology outcomes.

PhoenixTeam at a Glance:

Year Founded:

2015

Headquarters:

Arlington, Va.

Domain & Tools:

Salesforce | Mulesoft | JIRA | Confluence
MISMO | UMDP | URLA | UCD | LOS | POS
Servicing Systems

Clients:

Top Mortgage Lender and Servicer
Department of Veterans Affairs (LGY DevOps)
United States Department of Agriculture
(SFHNO Program Management Support)
Housing and Urban Development
MISMO

Key Statistics:

75 Employees
389.37% Growth over 3 years
SAFe Certified, CSM Certified, MISMO Certified

Awards:

2020 Inc. 5000, Ranks No. 1160
2020 Progress in Lending's Lending Luminary,
Tanya Brennan
2019 Accenture Small Business Award

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Disciplines:

At PhoenixTeam, our mission is to deliver our clients value at scale. With an exclusive focus on the mortgage industry, we delight our clients and deliver value through technology implementation. To achieve this, our team disciplines establish standards of professional excellence in their respective domains and guide professional development within our own organization.



Product Management

We are experts in discovering and validating new opportunities quickly and abandoning bad ideas even faster. Whether we are helping clients expand their Salesforce product capabilities, enhance existing products, or discover the fit of net new transformational offerings, we focus on value all the way and help our clients do the same.

- Agile discovery and value realization
- Product market fit analysis
- Product Vision and Roadmap
- Product Objectives and Key Results
- Product value definition and metrics
- Backlog refinement

“PhoenixTeam’s Product Managers’ vision, determination and ego-free leadership style have us on track to deliver an amazing product that will change digital mortgage forever.”

Complex Salesforce Product Expansion | Executive | Top Mortgage Lender



Engineering and Analytics

We are experts in digging deep into and developing complex code and analytics. We guide our clients on how to develop and deploy small, iterative, chunks of value fast and error free.

- Data Mapping Analysis
- Business Conditionality
- Transformation Logic

“The value PhoenixTeam brings to every level of Technology Architecture is almost irreplaceable. They have earned our trust to handle our biggest and most impactful initiatives and have truly become members of the team. PhoenixTeam has made a huge impact at our organization, helping deliver a number of key initiatives and steering our technology strategy in the right direction.”

Technology Redesign | Senior Managing Director | Top Mortgage Lender



Quality Management

No code is good code if it does not work as expected. Our experts educate and lead our clients to understand the value of early and often testing, particularly, complex end-to-end testing.

- Test Case Development
- Test Strategy and Plan Creation
- Test Plan Execution
- End-to-End Testing Leadership
- Production Issue Management and Resolution

“There are a few things about PhoenixTeam that stand out to me that deserve focused recognition: small organization with dedicated touch points, clear path for areas of responsibility within the organization, sincere empathy, follow through, expertise...I would like to point out that PhoenixTeam has not only been a business partner but also a great friend. Aside from the work always getting done there have been a lot of laughs along the way which is sometimes just as valuable as the work itself.”

Testing Leadership and Execution | Lead Management and Program Analyst | USDA



Training and Coaching

We are experts in creating and delivering custom training materials and content to ensure that the end users have a complete and comprehensive understanding of the new product and its value.

- Training Strategy and Plan Creation
- Custom Training Delivery
- Custom Training Documentation
- Facilitation and Advisory Support

“PhoenixTeam’s Scaled Value Delivery Training gave us a guide that fostered collaboration, objective outcomes, and diversity of thoughts.”

Value Focused Training | Sr. Director of Business Strategy | Top Mortgage Lender



Implementation and Project Management

It’s all about execution! We are experts in using innovative Agile approaches to implement value, and attain adoption, even on complex Salesforce implementations. We do this with assured quality and certainty.

- Implementation Schedule Plan and Management
- Lender Engagement Communication and Support
- Executive Communication
- RAID Log Management
- Blocker Management

“PhoenixTeam played a big role in my plans to reimagine our team. Their support with long overdue production, workflow, business metrics and visibility is a huge step to get us closer to our goals.”

Complex Salesforce Implementation | Vice President | Top Mortgage Lender