



PhoenixTeam



KEY PERSONNEL

Tanya Brennan
Managing Partner

Tela Mathias
Managing Partner

Thomas Westerlind
Managing Partner

Lindsay Bennett
Senior Manager

Melanie Lewis
Senior Manager

John Comiskey
Senior Manager

STAFFING

20 employees

CONTACT INFORMATION

1005 North Glebe Road
Arlington, VA 22201
Phone: 571.414.0288
Email: PhoenixTeam@PhoenixOutcomes.com
Web: PhoenixOutcomes.com



COMPANY DESCRIPTION

At PhoenixTeam, we focus exclusively on the design and implementation of mortgage process and technology solutions. Customers turn to us when they need to redesign a mortgage process, implement a mortgage technology solution, and require program management leadership. We are the experts in this space, having successfully implemented mortgage technology solutions in both the federal and commercial space.

COMPANY HISTORY

Formed in 2014, PhoenixTeam was created by three friends who shared a long work history. Phoenix was a return to their roots and the realization of a 15-year goal to build a team together to serve federal and commercial clients in the mortgage industry. Each managing partner serves clients directly with recent, relevant experience in each practice area.

BUSINESS LINES, SERVICES, AND PRODUCTS

Mortgage Process Technology Design and Implementation in Federal and Commercial Space

- Design, build, and implement new technology
- Lead business process engineering
- Determine customer needs, system weaknesses, and unmet business needs
- Assess current state
- Envision the target state

Agile Project and Product Management

- Hands-on planning
- Lead product launch
- Full lifecycle product guidance through post-production operations

Solution Design and Implementation

- Create outcomes focused on customer value
- Understand customer requirements and create user stories
- Collaborate with development teams
- Build and lead functional solution teams

Facilitation and Advisory Support

- Facilitate diverse groups of people
- Achieve time-boxed results
- Provide experience-based mortgage technology expertise

GEOGRAPHICAL SCOPE AND COVERAGE AREA

National

KEY FEATURES/BENEFITS

Unlike your ordinary management consulting company, we specialize in one thing—mortgage technology—and we do it better than any other company. How can we be so sure? Every single one of our employees:

- Not only knows mortgage but also specializes in a particular area;
- Has taken mortgage technology solutions to production, many in leadership roles;
- Has specialized training in The Phoenix Way and all the skills, methods, tools, and techniques that we have honed over more than 20 years in the housing market;

PhoenixTeam knows mortgage, technology, and process engineering. Don't waste your money "getting up to speed"—spend money to achieve an outcome. PhoenixTeam will do it better, faster, and for less.

ADDED VALUE TO CLIENTS

- Compensates team members on outcomes, not billable hours
- Exclusive proprietary practitioner training and certification program
- All team members are Agile ScrumMaster certified
- Only hires mortgage experts
- Trained and certified on BPMN and DMN

INDUSTRY AWARDS, ACCOLADES, AND MILESTONES

U.S. Department of Veterans Affairs (VA) selected PhoenixTeam to modernize their servicing oversight program and replace the current VA Loan Electronic Reporting Interface. PhoenixTeam has a long relationship with the VA Loan Guaranty Service, having implemented the original solution back in 2008. Even before the implementation, PhoenixTeam led the business process redesign team that implemented the largest regulatory revision in the history of the program. As a significant subcontractor to Accenture Federal Services, Phoenix leads functional aspects of the program and agile teams, supports the customer changes process, tests software, and does what it takes to make the project successful.

TESTIMONIAL

"For over three years, Phoenix has worked side-by-side with my team to launch new products, implement technology solutions, onboard new clients and strategic partners, and improve our solution delivery process. For one of the new products launched recently, Phoenix defined the essential product features and fiercely managed the scope and delivery approach, delivering the product within 90 days. I was surprised at how quickly Phoenix completely merged with my team and engaged with my leaders and our culture. I trust Phoenix completely to deliver tough projects on tight timelines."

—CEO/Founder, Mortgage Technology Vendor