

# Implementation

Focused on continuous execution and adoption. The Phoenix Way.



Quick Facts

### Disciplines:

- Implementation Leadership
- Project, Program and Portfolio Management
- Provider, Partner, Vendor, Customer Engagement
- People Leadership
- Delivery Management
- Conversion Management
- Event Management
- Governance, Compliance and Risk Management
- Change Management
- Production Support and Incident Management
- Operations Design
- Strategic Planning and Plan Management

### Operating Media & Resources:

- Microsoft Project | Microsoft Visio | Microsoft TFS | Confluence | JIRA
- Productboard | Lucidchart | Miro | Smartsheets

### Certifications:

- Certified Mortgage Banker / Accredited Mortgage Professional
- Certified SAFe® 5 Agilist
- Certified SAFe® 5 Practitioner
- Certified SAFe® 5 Product Owner/Product Manager
- Certified SAFe® 5 ScrumMaster
- Project Management Professional (PMP®)

## Fiserv

When an enterprise implementation is needed, fintech companies know where to turn. We were proud to lead an OCR implementation for our client's customer, a leading FHA and VA lender. This two year implementation included an in-depth, detailed discovery process where we documented current processes, gaps and future state vision throughout the enterprise. Given the size and complexity of the scope, we crafted and drove forward a plan capturing OCR team efforts and the customer's adoption readiness. Our goal was to gain alignment and, where we needed to pivot, we could do so quickly. This approach resulted in a successful enterprise OCR rollout.

### Our Impact:

7 LOBs

~700 documents

Repeat client

## Mortgage Industry Standards Maintenance Organization (MISMO)

MISMO requested our implementation leadership and project oversight support for its Innovation Investment Fee implementation. The scope involved creating and maintaining process diagrams, creating policy and procedure documentation, capturing and tracking RAID log items, developing the roadmap, defining key performance metrics, and managing an executive dashboard, project plan, and initiative tracker logs. Our 10+ years experience serving MISMO as a trusted advisor and our mortgage lending subject matter expertise was a huge factor of our mutual success. The major success factor was our ability to quickly analyze, assess, implement, integrate and test MISMO data standards.

### Our Impact:

New Revenue stream

Audit Process efficiencies

Increased throughput

Enhanced process

## Mortgage Risk Management Division of a Global Financial Services Corporation

Phoenix was engaged to reinvent an implementation of a post-settlement audit automation product for one of our client's largest customers. It had been nearly 2 years in implementation without going live. Phoenix assessed the current state of business requirements, technology build, and customer feedback on the implementation. We quickly proposed an implementation plan that leveraged agile methodology and frequent implementation of new layers of the solution. Within 8 weeks we were live with our first rollout and went on to manage seven total rollouts to finish out the implementation.

### Our Impact:

Improved customer sentiment

Audit Process efficiencies

Repeat client

## United States Department of Agriculture (USDA)

USDA requested our mortgage transformation brains and brawn two years into a Salesforce Community and Government Cloud implementation. With our passion for helping people find home ownership opportunities in rural America, we were thrilled to answer the call. Within one year, our team successfully implemented the new Guaranteed Underwriting System based on the new Uniform Residential Loan Application and FNMA DU MISMO 3.4 v 1.8.1 specifications for import file. We leveraged our product management, implementation, quality assurance, backlog management and lender engagement expertise to bring this one home for the farming community.

### Our Impact:

15 integrations

1,400 active lender participants

Path to B -> G automation

Custom redesign

## Our Special Sauce:

We are experts in the consumer lending and financial services industry. Period. This is PhoenixTeam's focus. Combine our industry knowledge with our implementation expertise and you have a machine of folks that get in and deliver value fast with little to no ramp up time. We amaze Clients by delivering a solution within a matter of weeks, allowing us to iterate, refine or tackle new high-value features quickly. Every one of our team members, including Managing Partners, are boots on the ground, digging deep to delight Clients with their desired outcomes.

dynamic intrepid badassess  
leaders progressive valuable  
collaborative **tenacious**  
**motivated** analytical  
unique **authentic** jedi  
adaptable dedicated  
respectful impactful fierce  
**family** humble focused  
supportive charitable **smart** respectful  
**altruistic** innovative  
intelligent **conscientious**  
supercalifragilisticexpialidocious  
**outcomes** value **team**

PH<sup>ENIX</sup>TEAM

delivering better outcomes.