

# Salesforce

Focused on value and impact.  
The Phoenix Way.



## Quick Facts

### Salesforce Certifications:

- Certified Administrator
- Certified Community Cloud Consultant
- Certified Sales Cloud Consultant
- Certified Service Cloud Consultant
- Certified Platform App Builder

### Clouds:

- Marketing Cloud
- Sales Cloud
- Financial Services Cloud
- Community Cloud
- Government Cloud

### Leadership Disciplines:

- Implementation Leadership
- Product Leadership
- Solution and Design Leadership
- Quality Assurance Leadership



## Department of Veteran Affairs (VA)

When VA Loan Guaranty needed a trusted partner to modernize their loan servicing oversight system (VALERI), they relied on us to lead the charge. We rallied our team and leveraged Salesforce to provide a more streamlined, integrated, and intuitive user experience. We developed a custom redesigned VALERI-R, leveraging Salesforce’s Enterprise Cloud, Government Cloud and Knowledge Cloud. The scope included redesigning the system’s oversight, workflow, claims and payments components. Our team’s leadership, from stakeholder management to solution architecture, to test case development, was instrumental in successfully releasing VALERI-R to production in 2019. To this day, we continue to maintain and enhance VALERI-R for our partners at VA.

### Our Impact:

- 3M loans
- 3,000+ users
- 40+ integrations
- Custom redesign

## Top Mortgage Lender & Servicer

Implementing complex lending business logic in Salesforce quickly is a secret passion of ours. We led the effort to enhance our client’s existing Salesforce CRM and are in the process of migrating it from one Salesforce Org and are in the process of migrating it from one Salesforce Org to another. Within the first week of our engagement, we built and delivered a solution to onboard new business partners. Simultaneously, our team documented and implemented Salesforce development and configuration best practices. We never exit our engagements without sharing our knowledge and fully preparing our clients to self-support after our departure.

### Our Impact:

- 2,500 internal users
- 10 business units
- 50,000+ external users
- 1M+ records

## Top Mortgage Lender & Servicer

After more than two years of trying to implement Salesforce, our client reached out to us with an urgent need to deliver value fast and prove out their substantial investment. Within a matter of weeks, our team reimagined the product vision, mission, and scope. We defined the first container of rapid value and 12 weeks later, onboarded the client’s first users. Our team’s approach to this engagement is unique, focusing on the “art of the possible” and establishing a “Salesforce first” mentality. While the scope of the overall project is complex, introducing Salesforce CRM solution, omnichannel communications and work routing, our techniques drove the value realization with speed and precision. Our team continues to quantitatively assess the highest value capabilities to deliver and release those capabilities to production every 4-8 weeks. Nonstop value.

### Our Impact:

- 10 integrations
- 10M+ accounts
- ~10,000 expected users
- 4-8 weeks time to value

## 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 deep Salesforce 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 Salesforce 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**

PHENIXTEAM

delivering better outcomes.