

# Training & Coaching

Focused on continuous learning and development. The Phoenix Way.



Quick Facts

## Facilitation:

Strategic Planning and Off Site Collaborative Planning Events  
Agile Ceremonies and Events  
Design Sprints  
Product and Customer Discovery Workshops  
Lead Decision Jams

## Advising and Coaching:

Transformation Planning and Execution  
Portfolio Management  
Product Management  
Teams, Trains, Team of Teams Coaching  
Agile Marketing and Agile HR  
StratDevOps and Scaled Value Delivery

## Training:

Agile Team (Scrum/XP, Kanban)  
Scaled Agile (Large Scale Scrum & SAFe)  
StratDevOps and Scaled Value Delivery  
Role and Skillset based Programs  
Leadership and Professional Development  
Training From the Back of the Room (TBR & TBR-V)  
Mortgage Industry & Salesforce

## Department of Veteran Affairs (VA)

When VA Loan Guaranty needed a trusted partner to modernize their loan servicing oversight system (VALERI-R), they relied on us to plan, design, develop and deliver 508 compliant, custom curriculum to thousands of servicing partners and over 350 VA employees. In addition to the Virtual Instructor Led training through Adobe Connect, we partnered with the VA's leadership team to record a series of 10 training modules to ensure new VALERI users had immediate access to critical training. This online training was supplemented with user access to a Salesforce sandbox where users were given hands-on exercises to reinforce the tutorial based training. Finally, we utilized Salesforce Knowledge to create a fully online User Guide which contains hundreds of Knowledge articles for VA and Servicer users. This training was instrumental in successfully releasing VALERI-R to production in 2019.

### Our Impact:

**350+ VA**  
employee users

**3,000+**  
service users

**200+**  
knowledge articles

**25+**  
hours of training delivered

## Top Mortgage Lender & Servicer

A top mortgage lender was struggling with identifying, aligning, and delivering continuous, incremental value. With the goal of helping trains and team of teams align on various technical approaches and value delivery, Phoenix implemented a Scaled Value Delivery Community of Practice, cementing the value at scale concepts. We helped teams put these techniques into practice by creating and following experiments and deep diving into specific topics of facilitation, product management, and Lean-Thinking. We facilitated feature writing workshops for Product teams, enhancing skills around refinement, and identifying and mitigating waste. Leveraging the learnings and feedback from training and coaching over the course of a year, our team developed a comprehensive year-in-review analysis of the organization's value delivery and path towards continuous improvement.

### Our Impact:

**Better**  
alignment

**Increased**  
throughput

**Faster**  
hypothesis validation

**Stronger**  
collaboration

**Improved**  
product mindset

## Top Mortgage Lender & Servicer

When a top Mortgage company sought training on how to deliver value at scale, with a focus on Product Management best practices and thinking, they trusted us with the task. With our experience in the software implementation and mortgage industry, we customized our commercial Scaled Value Delivery workshop to meet the client's specific needs. This interactive, four-day workshop brought together participants with different skillsets through hands-on experiential learning. With a focus on realizing business value, we educate participants on how to design and communicate a vision, collaborate with team members across business, product and technology, and ultimately, successfully deliver value with little waste. We took the very best of product management, software delivery, Agile, SAFe, and change management to create and deliver what one participant called "hands down, the absolute BEST training I have received in 15 years."

### Our Impact:

**~300**  
people trained

**17**  
workshops delivered

**2 weeks**  
from onsite to virtual

**92%**  
NPS

## United States Department of Agriculture (USDA)

A major factor that differentiates Phoenix from other consulting firms is our determination to make sure our clients have the training and learning materials to support their initiatives. It was imperative that we provide the USDA with this knowledge support during its Salesforce Community and Government Cloud implementation. We provided fully customized training curriculum that is now required training for all USDA employees and their loan origination partners. Using Camtasia, we developed 15 Lender and 6 Employee training tutorials which included a knowledge check and certificate of completion. Each tutorial was closed captioned and fully 508 Accessibility compliant. The training was written, recorded and released in less than 60 days, including client and 508 review. Our ability to deliver large volume, high quality training is a superpower for our training team and we were thrilled to be able to share our passion for learning with the USDA and their partners.

### Our Impact:

**21 custom**  
training modules

**Design to**  
Release in less than 60 days

**30+ hours**  
of content

**Closed Caption**  
& fully 508 compliant

## 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 training and coaching 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 training and coaching 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.