



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:

139 Team Members | 244% Growth over 2 years
SAFe Certified, CSM Certified, MISMO Bootcamp
Certified, Salesforce Certified

Awards:

2022 Washington Business Journal Best of Pride
2022 Washington Business Journal Best Places to Work
2022 Great Places to Work Certified
2022 Inc. 5000 Regionals, Ranks No. 41
2021 Inc. 5000, Ranks No. 911
2022 | 2021 Inc. Best Workplaces
2021 Inc. 5000 Regionals, Ranks No. 52
2020 Inc. 5000, Ranks No. 1160
2019 Accenture Federal Services 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.



Salesforce

We are experts in the consumer lending and financial services industry. 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. 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.

- “Art of the possible”
- “Salesforce first” methodology and mindset
- Lock in on needle movers
- Business vision meet technical strategy



Product

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.

- Product Management
- Product Development
- Product Design



Engineering & 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
- Solution Architecture



Quality Assurance

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



Training & 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



Implementation

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

Testimonials:

We are customer focused. We think about the customers’ desired outcomes and align our work to what they need. We avoid overpowering the customer. We listen. We incorporate our customers’ culture, colors, and style into our work.

Engineering & Analytics

“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**

Product

“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**

Salesforce

“All members that I have worked with are always helpful in resolving or researching the issue at hand. The collaboration of the team members is always great. Super resourceful individuals. Always willing to go the extra mile.”

**Complex Salesforce Design & Implementation
Leader | Veterans Administration**

Quality Assurance

“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 & Coaching

“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

“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**

What our clients say about us.

We thrive on tackling the most challenging problems while still staying true to our values.