

Salesforce Implementations

Focusing on value and outcomes.
The Phoenix Way.



Quick Facts

Salesforce Certifications:

- Administrator
- Application Architect
- Community Cloud Consultant
- Data Architecture & Management Designer
- Marketing Cloud Consultant
- Marketing Cloud Email Specialist
- Marketing Cloud Developer
- Platform App Builder
- Platform Developer I
- Sales Cloud Consultant
- Service Cloud Consultant
- Sharing and Visibility Designer

Clouds:

- Marketing Cloud
- Sales Cloud
- Financial Services Cloud
- Community/Experience Cloud
- Government Cloud
- Service Cloud

Services Offered:

- Product Vision and Strategy
- Implementation Leadership
- Architecture and Design
- Development
- Configuration
- Quality Assurance
- Training and Documentation



Government Cloud for a Federal Housing Agency

When it was time to modernize VALERI, the mortgage loan oversight solution for the Department of Veterans Affairs Loan Guaranty Service, PhoenixTeam leveraged Salesforce to provide a more streamlined, efficient and user-friendly experience. We developed a custom redesign, VALERI-R, using 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 test case development, was instrumental in successfully releasing the MVP in 2019. To this day, we continue to deliver iterative value to our friends at the VA.

By the Numbers:

3M+ loans

3,000+ users

40+ integrations

Financial Services Cloud for a Top Mortgage Lender

After nearly two years of trying to implement Salesforce, our Client reached out to us with an urgent need to deliver value fast. 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. After the initial launch, PhoenixTeam continued to provide product management, configuration and development support to achieve the client’s vision of using Financial Services Cloud to manage their customer journey throughout the mortgage lifecycle and optimize the routing of work to their sales and support teams.

By the Numbers:

30M+ client accounts

1,000+ users & growing to 10,000+

10+ integrations

Sales Cloud for a Financial Services Startup

Our client reached out to us in October with a vision to use Salesforce to launch their financial services business in January. We chose Sales Cloud and used a configuration first approach to maximize speed to market. Our solution incorporated lead and opportunity management with integration to both a full stack telephony/dialer/text communications provider and to Marketing Cloud. The startup launched successfully on time and they have seen double digit growth leveraging Salesforce.

By the Numbers:

12 weeks from day 1 to CRM launch

20+ Sales team members supported (and counting)

“Phoenix has been instrumental in laying the foundation for [our] CRM. They immediately jumped in and got to work, and quickly added value to the Sales team...We absolutely could not have done it without them!”

Client Product Owner
Financial Services Startup

