PHOENIXTEAM

Enterprise-Wide Product & Delivery Excellence

Bringing joy and purpose to the design, delivery, and care of technology solutions for federal and commercial clients.

Trusted by the U.S. Federal Government and the world's leading mortgage organizations.

At PhoenixTeam, we specialize in business and technology delivery excellence, providing strategic industry thought leadership, product discovery and delivery, and PMO leadership for federal and commercial fintech clients. As mortgage technology experts, we tailor solutions to precisely address the distinct needs of each client. Our team is intellectually curious, continuously learning from experience and adapting quickly to predictably deliver creative, customer-centric solutions that effectively address our clients' most challenging issues and help them achieve their goals.

VA | USDA | DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT | mismo | fiserv. | Stavvy | DocMagic | LENNAR

"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." - Vice President | Complex Salesforce Implementation | **Top Mortgage Lender**

Awards and Achievements

Inc. 5000 | Inc. Best Workplaces | Inc. Regionals MID-ATLANTIC 2023 | US 2022 FIN TECH awards | WASHINGTON BUSINESS JOURNAL BUSINESS OF PRIDE 2022 HONOREE | LARGEST WOMEN-OWNED BUSINESS | TOP-PERFORMING SMALL TECHNOLOGY COMPANIES | GROWING

POINT OF CONTACT

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mismo CERTIFIED CONSULTANT | SBA U.S. Small Business Administration | GSA MAS
salesforce PARTNER | WOSB CERTIFIED | DOD SKILLBRIDGE

WE KEEP PROMISES. MEET SCHEDULES. OWN RESULTS.

PHOENIXTEAM

Core Competencies

Business & Technology Transformation Advisory Services
Organizational Discovery & Design
Leadership Workshops & Facilitation
SAFe Lean Portfolio Management (LPM)
Strategic Objectives & Key Results (OKR)

Product Management & Design
Product Discovery & Market Fit
Rapid Prototyping & Design Sprints
Value-Driven Product & Implementation Roadmap

Solution Architecture & Engineering
Current & Future State Architecture Assessments
Cloud & Platform Migration
Infrastructure Integrations Design & Implementation

Operations & Maintenance (O&M)
Helpdesk & Production Support
System and Environment Monitoring & Maintenance
Continuity of Operations, Security Compliance, & Infrastructure Support
Multi-Vendor Release Coordination & Management

Software Quality Assurance & Optimization
Test Driven Development / Business Driven Development
Manual, Automation, & 508 Accessibility Testing
Test Data Strategy & Implementation

Data Analytics & Visualization
Data Architecture Design & Implementation
Reporting and Dashboard Design & Optimization
Process & Governance Best Practices Guidance

Project Management & Implementation
PMO Leadership & Support
Executive Communication
RAID Log Management
Third Party Engagement & Implementation Support

Change Management, Training, and Transition
Organizational Impact Assessment
Planning, Coordination & Execution
Communication Development & Delivery

Scaled Value Delivery Coaching
Agile Team Roles & Responsibilities
Requirements Development Best Practices
Work Estimation & Planning

We build relationships with our clients and their customers that are based on empathy, authenticity, and transparency.

Past Performance

VA: VALERI-R Modernization I LGY Analytics I LGY DevSecOps

USDA: Data Mapping and Analysis I Business to Government (B2G) Automated Underwriting System (GUS) I URLA Mapping and GUS Rapid Assessment I GUS Program Management (for URLA) (*Prime*) I GUS B2G Specification I Surpass DME (Development, Modernization, and Enhancement) (*Prime*)

HUD: FHA Catalyst DME (*co-Prime*)

Top Mortgage Lender and Servicer: Strategic Business Model Design and Launch I Salesforce CRM Migration and Implementation I Lead Generation Product Modernization I SAFe Implementation I Customized Scaled Value Delivery Training & Implementation

Fiserv: Enterprise OCR implementation for a top Mortgage Lender and Servicer Client I UCD Implementation for Top Credit Union Client

MISMO: Innovation Investment Fee Implementation I **Cenlar:** Enterprise Workflow Solution Initiative I **DocMagic:** Product Management, Business Analysis, Quality Assurance, Change Management I **Lennar:** Closing Process Mapping and Root Cause Analysis

Differentiators

✔ **Customer-Centric Approach:** We prioritize your processes and culture to deliver solutions aligned with your customer's needs and requirements.

✔ **Specialized Expertise in Agile Technology Solutions:** With over 25+ years in the technology industry, our deep knowledge allows us to excel in blending elements of SAFe, Agile, Scrum and LeSS, to develop and implement tailored strategies that ensure efficient and effective results, even in complex Salesforce modernizations.

✔ **Trusted Advisor Relationship:** We embed ourselves as trusted advisors who seek to understand your unique challenges and develop collaborative relationships between business and technology teams deliver value-driven solutions.

✔ **Diverse and Inclusive Leadership:** As a women and minority-owned small business, we prioritize diversity and inclusion fostering a dynamic and innovative work environment.

www.phoenixoutcomes.com