



# Enterprise-Wide Product & Delivery Excellence

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

**CAGE:** 7JBA5 | **UEI:** CB44G6CL51E6 | **SAM:** Registered  
**DUNS:** 092819977 | **BUSINESS TYPE:** Small  
**DESIGNATION:** Minority, Woman-Owned  
**CONTRACT VEHICLES:** GSA MAS Contract No. 47QTCA21D007X

**SPECIAL ITEM NUMBERS (SINS):** 54151S Information Technology Professional Services | 541611 Management and Financial Consulting, Acquisition and Grants Management Support, and Business Program and Project Management Services

**NAICS CODES INCLUDE:**  
541511 | 541512 | 541611 | 541618 | 541990 | 561499

## 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.



"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



### POINT OF CONTACT

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## 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 | LGY Analytics | LGY DevSecOps

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

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

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

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

**MISMO:** Innovation Investment Fee Implementation | **Centlar:** Enterprise Workflow Solution Initiative | **DocMagic:** Product Management, Business Analysis, Quality Assurance, Change Management | **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.