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BLUE PHOENIX

Enterprise-Wide Business & Technology Delivery Excellence for Federal Agencies

Combining our many years of deep technology expertise and military fundamentals to deliver greater value realization for U.S. Federal Agencies.

MENTOR

JOINT VENTURE

PHOENIXTEAM
SOLUTION DELIVERY EXCELLENCE
CONTRACT VEHICLE:
GSA MAS
DESIGNATION:
WOSB

BLUE PHOENIX
FEDERAL BUSINESS & TECHNOLOGY PMO AND DELIVERY EXCELLENCE
CONTRACT VEHICLE:
GSA MAS
DESIGNATION:
SDVOSB

BLUEBAY
BENEFITS DELIVERY EXCELLENCE
DESIGNATION:
SDVOSB

PROTÉGÉ

We serve as the right hand of business leaders, leading large projects and programs to create accountability and outcomes. Unlike traditional program support, we deploy seasoned leaders who understand people, process, and technology and how it works together to deliver on the business outcomes. We evaluate, collaborate, and execute missions with precision and quality.

Core Competencies

- ✪ Project planning and coordination
- ✪ Elicit and capture business and data needs
- ✪ Data and API strategy and execution
- ✪ Roadmap definition and evolution
- ✪ Project transparency and status reporting
- ✪ Governance, Compliance, and Risk Management
- ✪ Critical path dependency and impact assessments
- ✪ Strategic communications
- ✪ Scope and organizational change management
- ✪ Meeting and workshop facilitation
- ✪ Risk, Action, Issues, Decision (RAID) management
- ✪ Jira setup and administration

Differentiators

- ✪ Over eight years successfully modernizing programs by implementing complex solutions, including Salesforce, in the federal space
- ✪ Provide product, implementation, and program leadership services to the three largest federal housing agencies, VA, USDA, and HUD
- ✪ End-to-end technology lifecycle experts who can predict and solve program challenges before they occur
- ✪ Empower Veterans to leverage their experience, leadership, and military fundamentals to achieve the mission
- ✪ Objective and Key Results (OKRs) masters with 10+ years' experience helping organizations create an OKR mindset focused on alignment, transparency, and value realization

Blue Phoenix at a Glance

CAGE: 9KLT9
UEI: EE9FJ7MXJ5Z7
SAM: Registered

CONTRACT VEHICLES:
GSA MAS Professional Services
GSA MAS Information Technology - IT Services

SBA
U.S. Small Business Administration
SERVICE-DISABLED VETERAN-OWNED CERTIFIED

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:
541511 Custom Computer Programming Services
541512 Computer Systems Design Services
541513 Computer Facilities Management Services
541519 Other Computer Related Services
541611 Administrative Management and General Management Consulting Services

Past Performance

BLUE PHOENIX

U.S. Department of Veterans Affairs

Serving VA since 2017, we have directly provided PMO support, stakeholder, and organizational change management in the following ways:

- ✪ **VA DevSecOps** | Provide leadership and support across the program and was instrumental in the creation of the Agile Management Office (AMO). We collaborate with the business to elicit and capture high-level business and data requirements across the loan guaranty lifecycle.
- ✪ **LGY Loan Origination Transformation API Implementation** | Provide stakeholder and Lender engagement and change management support for industry technology adoption of LGY's new APIs.
- ✪ **LGY VALERI-R Modernization and Implementation** | Created, oversaw, and led pre-launch training for 100+ participants. Coordinated and provided transition and post-transition support, handling over 1000+ user requests.

Quality Highlights: Phoenix received Accenture Federal Services Small Business Partner of the Year Award in 2019.

USDA

Serving USDA since 2018, we are honored to have successfully led some of its most complex initiatives, such as:

- ✪ **Solution for UniFi Replacement Providing an Advanced Streamlined System (SURPASS)** | As **prime** contractor, we provide end-to-end program management leadership and support. Our subcontractors are Salesforce, Intercontinental Exchange Mortgage Technologies (ICE MT), Blue Bay Solutions Delivery, LLC, and Nginering.
- ✪ **GUS Program Management Support Services** | As **prime** contractor, we led external and internal change readiness and change management communications. Coordinated and provided transition and post-transition support. Provided leadership, industry subject matter expertise, and program implementation support, including all aspects of lender testing and onboarding, training development and facilitation, and managing a backlog of over 1000 epics, features, user stories, and defects.

Quality Highlights: "We always have taken pride in what we do and the products we have. Having a contractor support that really takes pride in their work and quality of the work is very enlightening and very much appreciated"
- Dean Daetwyler, Director, System Implementation and Management Division, USDA RD.

U.S. Department of Housing and Urban Development

In 2023, we were awarded the **co-prime** contract on one of HUD's most visible development, modernization, and enhancement (DME) initiatives.

- ✪ **FHA Catalyst** | Quickly after kicking off, we created an Integrated Master Schedule, developed internal processes using CMMI-DEV ML3 framework, defined, developed, and delivered metrics and media for presenting program health, status, budget, and resource management, and developed a Change Management strategy and plan leveraging ADKAR. We continuously manage RAID items in JIRA and all artifacts required for program oversight and stage gate approvals. Our subcontractors are Salesforce, Intercontinental Exchange Mortgage Technologies (ICE MT), C-HIT, Blue Bay Solutions Delivery LLC, and Nginering.

mismo

For over 10 years, we have served Mortgage Industry Standards Maintenance Organization (MISMO) as volunteers and front-line facilitators.

- ✪ **Innovation Investment Fee Implementation** | Created and maintained process diagrams, creating policy and procedure documentation, captured and tracked RAID log items, developed and executed on the roadmap, defined key performance metrics, and managed an executive dashboard, project plan, and initiative tracker logs.

TOP MORTGAGE LENDER + SERVICER

- ✪ **Launch of new business model** | Led the launch of a new business model that empowered financial advisors and insurance agents to originate mortgages. We led multiple workstreams through the product, implementation, and adoption lifecycle and developed and facilitated agile methodology at scale training for over 400 team members.

TOP MORTGAGE SERVICER

- ✪ **High priority Servicing Initiative** | Provided PMO and product management services, leading 150+ team members. We designed and implemented agile delivery practices across new and existing servicing products based on traditional scrum, adapted to deliver scrum at scale in a team-of-teams approach.

fiserv.

- ✪ **Top Mortgage Lender and Servicer Enterprise OCR Implementation** | Provided PMO and Implementation leadership to align the enterprise to a new document taxonomy and extraction initiative. Created and managed a holistic program plan and led Executive briefings and status updates.

Certifications: Project Management Professional (PMP), SAFe and CSM Certified, MISMO Bootcamp Certified, Certified MISMO Standard Professionals (CMSP), Associate MISMO Standards Professionals (AMSP®), Salesforce Certified
Professional Associations: MISMO, Mortgage Bankers Association (MBA), Salesforce Partner