

Ben Siegel

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PROFESSIONAL SUMMARY

AI-native product builder and integrations product manager. Owns the integration portfolio at Practifi, the Salesforce-native CRM for financial advisors: 15 partner connections across custodians, portfolio accounting and communications platforms, REST and SOAP, webhooks, OAuth and the full credential and token lifecycle, four of them custom-built in-house. Writes the specs, the statements of work and the development-hour estimates the delivery schedule runs on, and leads two engineers end to end through scoping, build, QA and release sign-off. Designed the sync model for an enterprise client's portfolio hierarchies, trusts, multi-entity households and percentage ownership, roughly 700 households moving daily, collapsing an 18-field mapping to one field plus one configuration record after reading the client's real data, then generalized it into a platform capability. Came up through engineering: two years as a Salesforce developer at U.S. Bank on the Business Loan Transformation, 90 to 100 percent hands on, then delivery consulting at West Monroe Partners. Founder of ChoreStar, taken solo from idea to launch across web and iOS, shipping a production AI feature with schema-validated structured output, a rule-based fallback and its own eval suite. 15 years in technology, 7 in financial services, 5+ in product-shaped work. Maple Grove, Minnesota.

CORE COMPETENCIES

Partner & API Integrations	Integration Lifecycle Ownership	REST/SOAP APIs & Webhooks	Integration Architecture	Data Model Design & Maintenance
ETL & Data Synchronization	API Security	Salesforce Platform (FSC, nCino)	Apex, LWC & SOQL	Backlog Ownership & Prioritization
User Stories & Acceptance Criteria	Release Planning & Sign-Off	Technical & Integration Documentation	Client Onboarding & Implementation	
Cross-Functional Team Leadership	LLM Application Development	AI Evals & Fallback Design	Retrieval & RAG Evaluation	Financial Services & Wealth Data

WORK EXPERIENCE

Practifi

Mar 2026 - Present

Associate Product Manager, Integrations

Remote

- Own a portfolio of 15 partner integrations connecting Practifi to the wealth-management ecosystem (Addepar, Schwab, Orion, Black Diamond, Tamarac, eMoney, Fidelity) plus marketing and communications platforms (Constant Contact, Mailchimp), 4 of them custom-built and maintained in-house.
- Designed an extended-ownership sync model for a large enterprise RIA client (~700 households synced daily), mapping Addepar portfolio hierarchies (trusts, multi-entity households, percentage ownership) into Practifi and collapsing an ~18-field client mapping down to a single field plus one configuration record. This is an ETL pipeline over live client custodial data (accounts, holdings, ownership structures), so it is built and maintained under the API security requirements that apply to sensitive financial information. Generalized the client-specific need into a new linked-only sync mode, now shipped and live in the client's production org, with general availability to all customers pending the next release.
- Defined the scope and requirements for Practifi's Model Context Protocol (MCP) server, ran all the initial testing, and validated it before release. It ships inside Sentir and connects the client data and relationship intelligence already in the CRM, so an assistant can work from live client context instead of a copy of it.
- Scope, estimation and statements of work for integration projects: write the SOW, size the work, and produce the development-hour estimates the delivery schedule and partner commitments are built on.
- Lead 2 engineers end to end on the integrations roadmap - scoping, build, QA, and release sign-off - balancing partner release timelines against client migration impact.
- Rebuilt the partner integration documentation, which had drifted as much as five to six years out of date - authored by employees who had since left, duplicated into competing versions of the same document, and describing integration releases clients had long since moved past.

Practifi

Jun 2025 - Feb 2026

Go-To-Market Platform Engineer

Remote

- Took on the partner integration documentation and the integration portfolio from September 2025, roughly six months before the product role was formally opened. The work started here; the job description followed in March 2026.
- Built Practifi's sales demo system, the internal tool Sales, Support and Account Managers used to stand up a working org and run end-to-end product demos from one place. A live trial is not possible on Practifi because the platform's value sits in its custodial integrations and those cannot be demoed against real client data, so the tool loads mock integration data in the shape it arrives from each partner (Addepar, Black Diamond, Constant Contact, Mailchimp) and renders HTML stand-ins for the installed widgets, letting a rep run a realistic point-and-click path. Each mock data set can be removed again as cleanly as it was loaded.
- Owned and prioritized the GTM platform roadmap; configured and troubleshooted the CRM to improve usability and adoption.

Practifi

Nov 2024 - Jun 2025

Salesforce Business Growth Consultant

Remote

- Designed a repeatable onboarding plan and template used across 25-30 client engagements. Onboarding speed is driven directly by the state of the client's data, so there is no single true measurement and the range is the honest answer: typical engagements went from 4-6 weeks to 1-2, longer implementations from 8-12 weeks to 2-4, heavier ones to 4-6, and the fastest completed in a single day.
- Ran an A/B experimentation program that lifted product engagement 25%.

Practifi

May 2023 - Nov 2024

Salesforce Functional Business Analyst

Remote

- Operated as a generalist individual contributor on a small team: pre-sales client conversations, data migration, QA, and delivery support alongside the analyst remit.
- Translated stakeholder requirements into build-ready user stories and acceptance criteria, running discovery workshops and user interviews to close gaps before engineering picked up work.

West Monroe Partners
Salesforce & nCino Business Analyst
Minneapolis, MN

May 2021 - Apr 2023

- Built and configured Sales Cloud, Financial Services Cloud, nCino, and Experience Cloud portals for financial-services clients.
- Owned engagements end to end: requirements, prototyping, build, and client deployment.

U.S. Bank
Salesforce Developer
Minneapolis, MN

Apr 2019 - May 2021

- Built Salesforce components on an Agile team for the Business Loan Transformation initiative, an enterprise rebuild of the bank's commercial lending platform.
- Spent 90-100% of time hands-on coding and testing across Salesforce and nCino, working directly with the nCino product team.

ChoreStar
Founder & Product Lead
Remote

2024 - Present

- Took the product from idea to launch solo across web and iOS on React, TypeScript and Supabase using AI-native development (Claude, Cursor): 180+ users and 2 paying customers, with the iOS app approved on its first App Store submission. Built in the open as a public repository (github.com/bendrumin/family-chore-chart).
- Shipped ChoreStar's in-product AI feature on Claude (Haiku 4.5): "Smart Chore Suggestions" generates age-appropriate, non-duplicate chore ideas personalized to each child's age, existing chores, completion rate, and time of year - AI in the product users touch, not just AI-assisted development.
- Engineered the AI path to degrade instead of fail: JSON-schema structured output re-validated with Zod, an authenticated endpoint with a per-user rate limit capping token spend, and automatic fallback to a local rule-based engine on any error, missing key, or rate limit.

EDUCATION

B.S., Web Design & Interactive Media The Art Institutes International Minnesota
Full-Stack Software Engineering Certificate Prime Digital Academy

CERTIFICATIONS

Salesforce Certified Administrator Salesforce
Salesforce Certified Associate Salesforce

SKILLS

Product Management: Product strategy & roadmapping, backlog ownership & prioritization, user stories & acceptance criteria, requirements & prototyping, scoping & statements of work (SOWs), effort estimation & development-hour sizing, customer discovery & JTBD research, pricing & positioning, product lifecycle management, launch & GTM, KPI definition & product analytics

Technical: REST/SOAP APIs & integration architecture, webhooks, real-time & batch data synchronization, ETL & data transformation, API security, Microsoft Graph API, data model design & maintenance, technical & integration documentation, SQL/SOQL, Postman, React, TypeScript, Supabase, Playwright (E2E test automation), full-stack development background

AI & LLM: LLM application development (Anthropic API / Claude), Model Context Protocol (MCP): defined scope, requirements and release validation for an internal MCP server; server configuration & daily use across Claude, Practifi, Apple, Atlassian, Microsoft 365 and Salesforce, retrieval & RAG (BM25 + embedding hybrid, Reciprocal Rank Fusion, citation-preserving chunking, gold-set evaluation with recall@k and MRR), structured outputs & JSON-schema constrained generation, Zod runtime validation, prompt design, AI evals, graceful-degradation & fallback design, rate limiting & token-cost control, AI-assisted development & agentic workflow automation (Claude, Claude Code, Cursor)

Agile Delivery: Scrum ceremonies, release planning, UAT, A/B experimentation, stakeholder & partner management, cross-functional team leadership, client onboarding & implementation, Jira & Confluence