

Ben Siegel

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PROFESSIONAL SUMMARY

Product manager for integrations on wealth-management platforms: 15 years in technology, 7 in financial services, 5+ in product-shaped work (business analysis to GTM platform to product). Came up through engineering (full-stack, then Salesforce developer); now own the integration portfolio of a wealth-management CRM (Salesforce, Financial Services Cloud, nCino). AI-native builder (Claude, Cursor). Known for turning client-specific needs into product capabilities and making advisory-firm data models (households, trusts, ownership structures) work.

WORK EXPERIENCE

Practifi

Mar 2026 - Present

Associate Product Manager, Integrations · Remote

- Four progressive roles in ~3 years: Salesforce Business Analyst, Growth Consultant, GTM Platform Engineer, Associate PM, Integrations. Practifi is a wealth-management CRM built on Salesforce.
- Own 13 partner integrations across the wealth ecosystem (Addepar, Schwab, Orion, Black Diamond, Tamarac, eMoney, Fidelity) plus marketing platforms; 4 custom-built and maintained in-house.
- Lead 2 engineers end to end on the integrations roadmap - scoping, build, QA, release sign-off - and act as the single voice for integrations in company-wide release forums.
- Delivered new integration functionality in 2 weeks against a typical 6-8 week cycle, compressing build, test and release alongside the partner and the client.
- Designed an extended-ownership sync model for an enterprise RIA client (~700 households synced daily), collapsing an ~18-field mapping to one field plus a config record; generalized it into a linked-only sync mode now live in the client's production org.
- Own the in-house Microsoft 365 integration on the Graph API - email and calendar sync advisors use daily, extending to SharePoint - and shipped Integration Hub Phase 1, consolidating scattered Salesforce setup into one guided configuration experience.
- Own the integration lifecycle from intake to release sign-off; established the release-gated verification cycle that keeps partner documentation accurate.
- As GTM Platform Engineer, the liaison between Sales and Engineering; joined sales calls as the technical voice for the platform, a solutions-engineering function in substance.
- Built Practifi's sales demo system, still in use: loads mock integration data in each partner's arrival shape so reps run realistic end-to-end demos. Ran internal discovery across the US business first.
- Compressed client onboarding with a repeatable plan and template (typical 4-6 weeks to 1-2; fastest 4 days to a single day); ran an A/B program that lifted engagement 25%; shipped production Apex and LWC features.

ChoreStar

2024 - Present

Founder & Product Lead · chorestar.app

- Launched solo across web and iOS on React, TypeScript and Supabase using AI-native development (Claude, Cursor): 150+ users and 2 paying customers, iOS approved on first App Store submission. Public repo: github.com/bendrumin/family-chore-chart.
- Shipped an in-product AI feature on Claude (Haiku 4.5) with JSON-schema structured output re-validated by Zod, an authenticated per-user rate-limited endpoint capping token spend, and automatic fallback to a local rule-based engine so it degrades instead of failing.
- Wrote the eval suite running representative child profiles against the live model, asserting output shape, valid categories, dedup and reward bounds; skips cleanly without an API key so CI never hard-fails.
- Own the integration layer (Stripe and PayPal webhooks, Supabase real-time sync), a Playwright end-to-end suite, and the whole product from research through pricing, launch, support and growth.

West Monroe Partners

May 2021 - Apr 2023

Salesforce & nCino Business Analyst · Minneapolis, MN

- Built and configured Sales Cloud, Financial Services Cloud, nCino and Experience Cloud portals for financial-services clients.
- Ran current- and future-state discovery directly with clients, translating pain points into requirements and user stories against feasibility, UX and business value.
- Built interactive Figma prototypes so clients could click through a solution before build; owned engagements end to end from requirements through client deployment.
- Staffed the go-live war room fixing issues in real time as systems went live; managed delivery across concurrent engagements using Agile/Scrum.

U.S. Bank

Apr 2019 - May 2021

Salesforce Developer · Minneapolis, MN

- Built Salesforce components on an Agile team for the Business Loan Transformation initiative, an enterprise rebuild of the bank's commercial lending platform - one of the first internal U.S. Bank hires on an effort staffed primarily by Accenture.
- Owned the portals work when the Paycheck Protection Program launched during COVID: federal relief lending stood up against hard deadlines with no precedent. Selected for it on front-end engineering strength, resolving CSS issues the team had treated as unfixable.
- Spent 90-100% of time hands-on coding and testing across Salesforce and nCino, working directly with the nCino product team.

Digital River

Oct 2017 - Apr 2019

Front-End Developer · Minneapolis, MN

- Built e-commerce sites for clients on a professional-services team using Git, Jira, HTML, CSS and JavaScript, including Webix work on a new portal for a major e-commerce company.

Ameriprise Financial

Jun 2015 - Nov 2016

Front-End Developer · Minneapolis, MN

- Designed and developed content for ameriprise.com, riversource.com and columbiathreadneedleus.com in HTML, CSS, JavaScript and jQuery, working from the UX teams' direction.

Thomson Reuters

Jul 2012 - May 2015

Front-End Developer · Minneapolis, MN

- Worked daily with the UX team on HTML and CSS and cleaned up their existing style guide; developed a single-page application from their prototypes and wireframes. Code and content changes to FirmCentral and WestlawNext.

ICF Olson

Aug 2011 - Jul 2012

Front-End Developer / Designer · Minneapolis, MN

- Collaborated with the Target.com team to relaunch the Target website in HTML and CSS across their multiple content management systems.

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 & Delivery: Product strategy & roadmapping, backlog ownership & prioritization, user stories & acceptance criteria, requirements & prototyping, customer discovery & JTBD research, pricing & positioning, product lifecycle management, launch & GTM, KPI definition & product analytics; Scrum, release planning, UAT, A/B experimentation, client onboarding & implementation, Jira & Confluence

Salesforce Platform: Sales Cloud, Financial Services Cloud (FSC), Experience Cloud (portals), nCino; Apex, Lightning Web Components (LWC), SOQL; Salesforce Certified Administrator & Associate

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, Postman, React, TypeScript, Supabase, Playwright (E2E test automation), full-stack development background

AI & LLM: LLM application development (Anthropic API / Claude), structured outputs & JSON-schema constrained generation, Zod runtime validation, prompt design, AI evals, graceful-degradation & fallback design, rate limiting & token-cost control, Model Context Protocol (MCP) server configuration & daily use, AI-assisted development & agentic workflow automation (Claude, Claude Code, Cursor)

Tools: Jira, Confluence, Slack, Microsoft 365, SharePoint, Notion, Figma (prototyping); remote-first across distributed, multi-timezone teams