

Andres Grant

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SUMMARY

Product integrations professional with seven years across wealth technology, platform products, **business analysis**, API delivery, and partner connectivity. Progressed from integration analysis into product ownership for RESTful APIs, **Single Sign On**, data extracts, data flows, and **open platform capabilities** supporting advisors, operations teams, and technology partners. Translates client and business needs into **integration specifications**, data mappings, workflows, acceptance criteria, and prioritized backlogs. Leads discovery, sprint planning, testing, release readiness, launch communications, issue resolution, and continuous improvement across concurrent initiatives. Coordinates engineering, compliance, product, design, client service, and partner stakeholders through secure data exchange and ecosystem dependencies. Brings client empathy, technical judgment, concise documentation, and organized execution to deadline driven delivery. Wealth management experience supports practical roadmap decisions, repeatable solutions, and dependable connectivity outcomes.

EXPERIENCE

Product Integrations Manager

May 2024 - Present

Summit Harbor Technologies

Philadelphia, PA

Owns product execution for advisor platform integrations, supporting **RESTful APIs**, Single Sign On, scheduled data extracts, partner workflows, release readiness, and continuous improvement. Coordinates engineering, compliance, client service, product, and external partner teams across concurrent connectivity initiatives.

- Translated wealth client needs into mappings, workflows, **acceptance criteria**, and sequenced **backlog items**.
- Led discovery and refinement for authentication, account data, portfolio information, and partner workflow initiatives.
- Coordinated partner testing and **release readiness**, including synchronized validation outside normal business hours.
- Reviewed incidents, **partner constraints**, and usage feedback, turning patterns into defects and roadmap candidates.
- Created implementation guidance and **enablement materials** for API capabilities across onboarding and support teams.

Senior Product Analyst, Integrations

January 2022 - April 2024

BlueStone Advisory Software

Malvern, PA

Managed **product** analysis for API and Single Sign On enhancements used by independent advisory firms. Connected client discovery, requirements, sprint delivery, testing, release validation, partner communications, and continuous workflow improvement.

- Documented API and **Single Sign On** needs through flows, mappings, edge cases, and **acceptance criteria**.
- Maintained traceability from client requests through **sprint planning**, demonstrations, release validation, and deployed behavior.
- Resolved partner mapping conflicts before development, reducing avoidable rework during implementation and client testing.
- Prepared capability summaries, implementation notes, support guidance, and **partner communications** for integration launches.
- Triaged defects and client requests across initiatives, clarifying severity, impact, dependencies, and priority.
- Used support trends and feedback to recommend repeatable improvements for **workflows** and technical documentation.

Business Analyst, Platform Connectivity

July 2019 - December 2021

Keystone Digital Finance

Conshohocken, PA

Supported financial platform connectivity linking internal applications with third party systems through APIs, file based exchanges, and authentication workflows. Built requirements, validation materials, release documentation, and stakeholder alignment while gaining ownership of cross team delivery.

- Gathered connectivity requirements for APIs, file exchanges, authentication **workflows**, and third party systems.
- Created process maps, data dictionaries, interface requirements, and validation scenarios for developers and testers.
- Supported API implementations from requirements through user acceptance testing, documenting defects and confirming fixes.
- Facilitated scope sessions with operations, technology, **compliance**, and client facing teams.
- Maintained release checklists describing dependencies, expected behavior, support guidance, and escalation paths.
- Built wealth workflow knowledge while taking ownership of cross team delivery tasks.

Product Operations Analyst

June 2018 - June 2019

Crescent Ridge Financial Services

Wilmington, DE

Supported digital financial service operations across enhancement requests, production issues, functional testing, release tasks, and product documentation. Turned stakeholder discussions and support trends into structured requirements, decision records, and practical workflow improvements.

- Tracked enhancement requests, production issues, and release tasks across **business** and technology teams.

- Converted stakeholder discussions into structured requirements, operational workflows, and decision records.
- Tested web product changes and data interfaces, recording defects and validating corrected behavior.
- Maintained release notes, issue logs, and product documentation for service and **engineering** continuity.
- Analyzed recurring support questions, identifying unclear **workflows** and documentation gaps for review.
- Balanced deadlines, **stakeholder communication**, technical detail, and customer impact across **software delivery** activities.

PROJECTS

Advisor Connectivity Release Program 📅 2024

Coordinated a recurring release program for advisor platform integrations, connecting requirements, partner validation, launch readiness, and support enablement.

Wealth Data Exchange Framework 📅 2022

Documented repeatable data mappings, validation scenarios, and issue workflows for financial platform exchanges involving APIs and scheduled files.

LEADERSHIP & AWARDS

- Selected by product leadership to represent integration capabilities in client and partner discussions.
- Recognized for turning recurring integration incidents into practical documentation and roadmap improvements.
- Provided peer guidance during backlog refinement, release validation, and complex partner issue resolution.

EDUCATION

Bachelor's Degree in Information Systems

Temple University GPA: 3.5

2018
Philadelphia, PA

Coursework: Business analysis, database systems, systems analysis, software project management

CERTIFICATIONS

- Certified Scrum Product Owner 📅 2022
- Agile Product Management Certificate 📅 2023

TECHNICAL SKILLS

- **API Technologies:** RESTful APIs, API implementation, Open platform capabilities
- **Identity Platforms:** Single Sign On, authentication workflows, access management
- **Data Integration:** Data extracts, data flows, file exchanges
- **Product Delivery:** Product management, product ownership, roadmap planning
- **Agile Practices:** Sprint planning, backlog refinement, backlog grooming
- **Quality Assurance:** Integration testing, user acceptance testing, validation scenarios
- **Requirements Analysis:** Integration specifications, data mappings, acceptance criteria
- **Release Management:** Release planning, release readiness, launch support
- **Partner Operations:** Partner connectivity, partner communications, ecosystem dependencies
- **Documentation Tools:** Technical documentation, implementation notes, release notes

SKILLS

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|----------------------|------------------------|-----------------------|---------------------------|
| • Product management | • Data extracts | • Acceptance criteria | • Integration testing |
| • Product ownership | • Data flows | • Backlog management | • Client discovery |
| • RESTful APIs | • Partner connectivity | • Sprint planning | • Technical documentation |
| • Single Sign On | • Data mappings | • Release planning | |

PROFESSIONAL AFFILIATIONS

- Scrum Alliance community participant, applying product ownership practices in software delivery work.
- Philadelphia technology community participant, sharing interest in financial platforms and practical integration delivery.

LANGUAGES

- English (Native)
- Spanish (Intermediate)

ADDITIONAL INFORMATION

Work Status : Authorized to work in United States. No sponsorship required.

REFERENCES

AVAILABLE ON REQUEST