

VICTOR WILLIAMS

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SUMMARY

Product executive running a five-product CRM and integration portfolio for wealth management firms: roughly 200 client firms, six product managers across the US and Canada, and pricing, packaging, and roadmap authority. Thirteen years in technology, nine in financial software, seven of them building and shipping software products, and four leading product managers. The portfolio spans Salesforce (ISV managed packages, Financial Services Cloud), Dynamics 365, and an integration platform that connects the CRM to custodians and portfolio systems including Black Diamond, Orion, Fidelity, Schwab, and Pershing. Built the AI enablement and governance framework that decides what ships, and directed third-party penetration testing and the Salesforce security remediation behind it. Spent eight years running infrastructure (hypervisors, storage, networking, Azure) before product, so architecture, identity, and integration reviews are work I have done with my own hands, not abstractions.

EXPERIENCE

Associate Director, Product Management, CRM and Advisor Workflow Portfolio | SS&C Technologies | Jacksonville, FL | Mar 2026 to Present

Scope: 5 products, 6 product managers across 2 countries (one leading a PM of their own), roughly 200 client firms, portfolio pricing and packaging authority. Four titles in five years at SS&C, Product Manager to Associate Director.

- Own product strategy and roadmap across the full portfolio serving roughly 200 RIA, broker-dealer, and trust firms: Salentica Elements on Salesforce, Salentica Engage on Dynamics 365, Data Broker, Black Diamond CRM, and ModestSpark, plus a professional services motion for larger clients.
- Shape pricing, packaging, and business-model strategy across the portfolio, weighing services revenue against product revenue to protect long-term margin.
- Shape platform and partnership strategy, including positioning the portfolio around Salesforce's shift to a headless, MCP-addressable architecture to deepen enterprise integration and strengthen the product bundle.
- Built the AI enablement and governance framework defining how AI and Agentforce capabilities are evaluated, gated, and approved for release, plus an AI-assisted pipeline (Azure DevOps, Power Automate) that drafts client-facing release material from PRDs and specs, taking production from days to hours.
- Directed third-party penetration testing and the remediation scope across core integrations, delivering under contractual client deadlines.
- Built AI-assisted diagnostic harnesses for integration investigations: one reads Salesforce event logs to reconstruct failure patterns, taking diagnosis from weeks to an afternoon; another compares working and failing HTTP captures and isolated a root cause in about five minutes.
- Own the portfolio's Microsoft relationship and Azure direction, including partner-program strategy and the roadmap for the integration platform.
- Drive cross-functional delivery on high-priority initiatives, standing up full project structure (BRD, technical spec, test and rollout plans) and a daily cadence across engineering and QA, and turning clean QA environments into demo and enablement assets for sales.

Senior Manager, Product Management | SS&C Technologies | Jacksonville, FL | Apr 2023 to Mar 2026

- Directed a team of six product managers across the US and Canada, leading CRM product management across Engage, Elements, and Data Broker end to end, from inception through delivery, in partnership with QA and engineering.
- Built the team's bench through a 12-month development program with OKRs and KPIs tied to revenue and retention, and served as a formal mentor to two colleagues across the org.
- Owned executive escalations for enterprise clients, building quantified revenue-and-cost impact models that drove rapid escalation and vendor response.
- Led the Salesforce Connected Apps security remediation (OAuth refresh token rotation, PKCE, MFA) across the managed-package suite, owning the approach and sequencing and delivering three weeks ahead of the platform enforcement deadline.
- Modeled the economics and shaped strategy around Microsoft CSP partner-program changes as new 30% growth thresholds took effect, protecting a major recurring revenue stream.
- Stood up Azure DevOps CI/CD pipelines for the Dynamics 365 product line using Power Platform Build Tools, replacing manual solution promotion between environments.
- Delivered the contact sync solution that put CRM at the center of the Black Diamond and InnoTrust ecosystem, replacing three disconnected systems with one connected advisor view and anchoring the CRM's place in the enterprise bundle.

Manager, Product Management | SS&C Technologies | Jacksonville, FL | Apr 2022 to Apr 2023

- Directed enhancements on Salentica Engage (Dynamics 365) and Elements (Salesforce), delivering digital onboarding and workflow automation for RIAs and wealth management firms.
- Stood up multi-custodian connectivity with four custodians and platforms (Fidelity, Schwab, Pershing, Orion) and cut regression cycles by about half through automated testing and parallel sprints, while supporting KYC and AML requirements.

Product Manager | SS&C Technologies | Jacksonville, FL | Mar 2021 to Apr 2022

- Owned CRM compliance and onboarding modules across Engage, Elements, and Edge, and defined the CRM-to-custodian data flows and digital consent integrations (Salesforce, DocuSign) that cut manual compliance work and reduced integration errors.

IT Project Manager | Greenshades Software | Jacksonville, FL | Feb 2020 to Mar 2021

- Owned product delivery for a SaaS payroll and tax platform: gathered requirements, set release scope and sequencing across CRM and platform work, and rolled out Agile across six departments. Built a custom Dynamics 365 environment on SharePoint and Power Automate.

Lead System Administrator | Greenshades Software | Jacksonville, FL | Nov 2017 to Feb 2020

- Led the infrastructure team for a SaaS payroll and HR platform, Hyper-V and VMware clusters, storage, networking, and the Azure footprint. Crossed into product work in 2019, owning CRM feature requirements, release scope, and sequencing alongside the product team.

Network Administrator | Advantus Corp. | Jacksonville, FL | Jan 2017 to Nov 2017

- Modernized network infrastructure across three states, managed integrations for five acquisitions, and designed the company's first offsite disaster recovery plan.

IT Manager and Systems Administrator | St. Johns County Clerk of the Circuit Court | St. Augustine, FL | Aug 2013 to Jan 2017

- Managed IT systems and infrastructure for 150+ workstations including the county's critical finance system, and led hardware sourcing and repurposing that saved more than \$30,000 a year.

EDUCATION

M.S., Information Technology, Florida State University, 2017

M.B.A., University of North Florida, 2015

B.A., Political Science (Pre-Law minor), Flagler College, 2012

SKILLS

Product and Strategy: Product Vision, Platform Strategy, Portfolio Ownership, Roadmap Ownership, Pricing and Packaging, Partner Ecosystems, Go-to-Market, Business-Model Strategy, OKRs and KPIs, Product Operations

Leadership: Team Leadership, Distributed Team Leadership, PM Hiring and Development, Cross-Functional Leadership, Stakeholder Management, Executive Escalation, Executive Communication

AI and Governance: AI Enablement Governance, Generative AI Strategy, Agentforce, AI-Assisted Delivery, Consumption-Based Cost Controls, Margin Protection

Platforms and CRM: Salesforce (ISV/OEM/CSP managed packages), Microsoft Dynamics 365, Black Diamond, SS&C InnoTrust, Salentica Engage and Elements, Data Broker

Integration, Identity, and Compliance: Integration Platform Ownership, Multi-Custodian Integration (Fidelity, Schwab, Pershing, Orion), API and Webhook Connectors, OAuth, PKCE, MFA, Connected Apps Security, KYC, AML, RIA and Broker-Dealer Compliance, Penetration Test Remediation

Technical Depth: RESTful APIs, Webhooks, Event Log and HTTP Capture Diagnostics, ALM, Git, Azure DevOps CI/CD, Power Platform Build Tools, Containerization, Cloud and Virtualization (Azure, Hyper-V, VMware)