JAYENDRA DALVI

SENIOR PRODUCT MANAGER | FINTECH & DIGITAL FINANCIAL PLATFORMS | TRANSACTION AUTOMATION

Product management professional with 15+ years of experience spanning software development, digital products, enterprise platforms, and business operations, including regulated financial services and compliance-driven workflows. Experienced in translating complex financial and operational requirements into scalable product capabilities across KYC/AML, investor qualification, document processing, onboarding, and AI-enabled workflow automation. Combines technical expertise with product strategy, roadmap ownership, prioritisation, regulatory collaboration, and data-led decision-making to improve processing efficiency, approval success, adoption, and delivery performance. Open to opportunities across the GCC, US, and Europe.

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SKILLS

Product Strategy & Roadmaps
AI-Enabled Products & Workflow Automation
KYC/AML & Regulatory Workflows
B2B SaaS & Platform Products
B2B SaaS & Enterprise Financial Platforms
ROI and RICE Evaluation Frameworks

WORK EXPERIENCE

Product Manager

TANGIBLE (Remote)

03 / 2026 - Present | London, UK

- Lead product development across the Advisor Portal, Auctions, and Relay, defining boundaries between deal coordination, price discovery, and legal execution while consolidating fragmented transaction intelligence into a unified system of record.
- Structure Relay workflows across five participant roles into 13+ epics and 158 stories, identifying 16 workflow gaps and proposing a dedicated Closing Completion epic to strengthen transaction oversight and execution.
- Translate PTP/QMS, ERISA, FOIA, investor qualification, and KYC/AML requirements into system rules and human-review checkpoints, collaborating with Legal, Operations, Engineering, and Proskauer counsel on transaction decisions.
- Drive a 5-milestone AI-advisory roadmap, standardise transaction data models and pricing rules, implement a GP/counsel review workflow using Cursor, and develop a 12-week operating-model rollout while deferring the AI assistant from v1 due to compliance timelines.

Senior Product Manager

COLLECTIVEOS

06 / 2025 - 07 / 2026 | Remote

- Led the full product lifecycle for an AI-native B2B platform, partnering with Sales and Customer Success across discovery, design, development, release, and go-to-market, with emphasis on scalable platform capabilities and customer-facing workflows.
- Defined a six-epic product roadmap and benchmarked 17 competitors across 14 dimensions to prioritise MVP capabilities, relationship intelligence, and platform trust.
- Architected BYON and Howard Reconnect Agent concepts with leadership, Design, and Engineering, specifying Gmail contact categorisation, five-source signal ingestion, Claude Haiku extraction, and relationship-graph requirements.
- Designed relationship-scoring models and a four-skill AI agent with two human approval gates, rejection loops, and 60-second undo; established evaluation criteria for accuracy, relevance, latency, and cost.

SENIOR PRODUCT MANAGER

ALPHA Augmented

06 / 2024 - 07 / 2025 | Remote

- Built a configurable workflow platform connecting Operations, Data, and Customer Success, enabling teams to assemble workflows 3× faster and supporting reusable capabilities across CO_2, invoicing, and freight.
- Introduced LLM-assisted validation, error prediction, and rule-conflict detection, reducing manual reviews by 60%, improving accuracy by 40%, and increasing internal adoption by 20%.
- Automated reconciliation and exception routing to eliminate 100+ hours of manual work weekly; improved sprint predictability by 30%, shortened release cycles from three to two weeks, and reduced production failures by 40%.

WORK EXPERIENCE

PRODUCT OWNER / SENIOR BUSINESS ANALYST

The Family Office

08 / 2021 - 06 / 2024 | Bahrain

- Owned product strategy for document and compliance workflows across Advisor, Compliance, and Operations, translating KYC/AML, Open Banking, and ID requirements into configurable rules and microservices.
- Improved financial-services workflow performance, reducing document-processing time by 40%, increasing approval success by 35%, and boosting retention by 18%; introduced an AI-powered assistant that raised advisor productivity by 25% and engagement by 5×.
- Applied ROI/RICE prioritisation and SQL-driven analytics using Power BI and HubSpot to focus delivery on high-value improvements, cutting non-essential backlog by 30% and increasing engineering velocity by 22%.

PRODUCT OWNER – DIGITAL ADVISOR

UBS

01 / 2017 - 07 / 2021 | Remote

- Defined global digital product roadmaps integrating competitive pricing and customer-experience KPIs, translating commercial priorities into scalable, customer-centric features designed to deliver measurable revenue impact.
- Led Adobe Experience Manager, Adobe Analytics, and SEO integrations across 20+ markets, aligning Agile delivery, backlog prioritisation, compliance, and accessibility to scale personalised digital experiences.

DIGITAL PROJECT MANAGER / TEAM LEAD / WEB SPECIALIST

Accenture Services Pvt. Ltd

07 / 2014 - 09 / 2017 | Mumbai, India

- Led enterprise digital marketing projects from feasibility assessment through implementation and stakeholder handover, translating business requirements into delivery plans aligned with project scope and strategic objectives.
- Developed content workflows, dashboards, and reporting infrastructure while managing cross-functional dependencies, project risks, and quality assurance to strengthen delivery visibility and implementation outcomes.

SOFTWARE DEVELOPER

Ashwamedh Infotech Pvt. Ltd

10 / 2009 - 07 / 2014 | Mumbai, India

- Developed and deployed internal tools and enterprise applications, contributing to application enhancements and improvements across existing legacy systems.
- Supported quality assurance automation, system upgrades, and user training initiatives, helping maintain application reliability and facilitate effective system adoption.

TECHNICAL SKILLS

AI & Automation
LLM workflows, LangChain, OpenAI API, Claude/Anthropic API, AI-assisted validation, agent workflows

Product & Delivery
Jira, Confluence, Productboard, Figma, FigJam, Azure DevOps, PRDs, user stories, acceptance criteria, Agile

Data & Analytics
SQL, Power BI, Looker Studio, Amplitude, Mixpanel, GA4, HubSpot, KPI evaluation

Platforms & Integrations
REST APIs, microservices, Postman, GitHub, n8n, Adobe Experience Manager, Adobe Analytics

PROJECTS

Internal Document Workflow & Approval Platform – The Family Office

- Developed a multi-stage document approval platform standardising identity verification, compliance, onboarding, validation, and exception handling across Advisor, Compliance, and Operations teams.
- Reduced cycle time by 40%, increased approval success by 35%, and achieved 5× engagement uplift through AI-assisted guidance.

Internal Automation & Validation Engine | Workflow Insights & Telemetry Platform – ALPHA Augmented

- Automated 60% of manual Ops workload, improved workflow reliability by 40%, and delivered consistent UX across modules.
- Increased workflow adoption by 20% and improved performance reliability through data-led iteration and continuous optimisation.

EDUCATION & SELECTED CERTIFICATION

Bachelor's Degree – Information Technology

Mumbai University

2008 | India