Colin Sidberry

Solutions-Oriented, Data-Driven

EXPERTISE

Product Management	4+ Yrs
Financial Services	4+ Yrs
Web Technologies	3+ Yrs

SKILLS

Core Competencies

PMI & Agile Methodologies, Defining Requirements, Problem Solving, Data Analysis, Data Visualization, WBS, Roadmapping, Exec Communication, Market Research, Backlog Management, Team Management

Product/Project Tools

PowerPoint, Azure DevOps, JIRA, Notion, Excel

Dev

HTML, CSS, JavaScript, SQL, BootStrap, ASP.Net, C#, Python, Ruby, Github

EDUCATION

University of Notre Dame, 2014
Bachelor of Arts, Economics | Math
Certified Financial Planner ™

CONTACT

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574-323-3700

HAVE YOU SEEN MY PORTFOLIO?

https://colinsidberry.github.io/ProductManager/

EXPERIENCE

Strategy & Leadership

ESSENTION Jan ’20 - Present

Project Manager

- Managed remote based development team for the city of San Francisco, from business/data analysis to production release. Prioritized user experience and business requirements. Resulted in 2 multi-year contracts and pending Microsoft Partnership.
- Worked with tech lead to develop work breakdown structure, project roadmaps, status, remove roadblocks, manage backlog, set sprint priorities.
- Led executive meeting to report status & ensure business goal alignment.
- Developed processes to increase client billing accuracy & simplify reporting. Result: 60% reduction in management hours spent on invoicing.
- Led internal project to enhance security measures for identity management, email, & file sharing. Ensured compliance with the city’s elevated vendor standards.

GROVE ADVISORS *(Acquired By Wealthfront)*

Voice of the Customer/Financial Planner Feb ’19 - August ’19

- Collaborated with the product owner to realize the product vision/roadmap & provide insight into the client experience. Resulted in an over 80% NPS score.
- Supported A/B and multivariate testing, varying client onboarding and advisor servicing processes. Resulted in a reduction in plan building time by 2 hours per plan (a 14% decrease).
- Created a scalable service model to increase automation of the planning process. Would cut plan time in half.
- Supported onboarding & planning for 300+ clients. Analyzed & addressed their debt management, savings, investing, retirement, & insurance planning goals.

Financial Services

FIDELITY INVESTMENTS July ’14 - June ’18

Financial Advisor

- Led team of 3 to build customer experience strategies, data-driven prospecting processes, & KPIs to become one of the top 20% of Fidelity Advisors nationwide.
- Facilitated 25+ branch seminars and developed processes to capture best practices.
- Developed over 200+ investment, retirement, income plans for clients with $100k - $1m+ in assets.

Personal Projects

Finance Your Dreams Oct ’17 - Feb ’19

Founder

- Conducted market research to develop target audience personas, user stories, and prioritize backlog.
- Used hypothesis-driven problem solving to identify the best way to marry site goals with target audience needs and draft wireframes to determine the optimal site UX.
- Ran surveys and interviews to gather prospective user feedback on MVP.
- Created copy, ran branding & social media, and measured results in Google Analytics.