

Sunny Shekhar

Senior Product Manager · AI & Regulatory Products · Product Owner · B2B SaaS · Fintech · Tax-Tech · RegTech · 0-to-1 · 12+ Years

Noida, India | +91 8595458403 | Sunnyshekhar2011@yahoo.com | [linkedin.com/in/sunnyshekhar](https://www.linkedin.com/in/sunnyshekhar)

PROFESSIONAL SUMMARY

Product Lead with 12+ years of experience across customer operations, business analysis, and AI product development. Started on the ground — managing high-stakes client escalations at American Express, coaching and driving KPIs at FIS, navigating compliance-heavy environments at Tech Mahindra. That decade of frontline experience is what shaped a different kind of PM — one who gets on the ground first and understands the problem deeply before jumping to documentation. Moved into product through Coditro, where I owned discovery, user research, and backlog prioritization across two concurrent product streams. At Occams Advisory, led and shipped 13+ products and tools — including a multi-department CRM platform, five AI-native products (TaxVantage AI, CFOInsights AI, Occams AI, Incubation AI, and the IEEPA Tariff Recovery Program), and multiple internal automation tools. The ERC CRM I led processed \$365M in claims across 5,000+ businesses. PSPO I Certified.

WORK EXPERIENCE

Product Lead (Senior Product Manager) · Occams Advisory New Delhi, IN (Remote) | Jan 2023 – Present

Occams Advisory is a bootstrapped AI-powered advisory firm offering SaaS products and consulting services across tax, finance, and regulatory compliance domains.

Phase 1: ERC CRM Platform — Jan 2023 to Dec 2024

- Led product for a multi-department CRM platform built from zero — covering Sales, Operations, Finance, Affiliate Management, Admin, and Lead modules — designed to support end-to-end ERC claims processing across 5,000+ businesses.
- Owned the full product lifecycle: conducted discovery with clients, advisors, and internal ops teams across all six departments; translated findings into user stories, acceptance criteria, and sprint-ready specs.
- Identified document collection as the primary bottleneck delaying claim submissions; redesigned the intake workflow across the Ops and Admin modules — cutting turnaround from 14 days to 3 and directly compressing time-to-revenue for clients.
- Defined and streamlined payout logic end-to-end within the Finance module — reducing commission processing time from multiple weeks to under 1 hour and eliminating a recurring source of advisor complaints.
- Drove defect rate down from 45% to 12% by instituting structured QA gates, acceptance criteria, and a Definition of Done across all CRM modules and delivery cycles.
- The platform enabled \$365M in ERC claims in FY 2023–24 — compounding improvements across all modules that accelerated client eligibility assessments and reduced manual review overhead.

Phase 2: AI Product Strategy & New Product Development — Jan 2025 to Present

- Built Occams' AI product team from the ground up and led delivery of 13+ products and tools — spanning five external AI-native products, internal automation platforms, and workflow tools across sales, operations, and client management.
- Took TaxVantage AI from zero to launch: led product discovery with R&D tax credit clients, designed an 11-stage self-service intake portal covering entity classification, technical qualification, financial data inputs, and payment — replacing a fully manual advisor-led process.
- Launched the IEEPA Tariff Recovery Program (TRP) in under 60 days: defined structured document intake requirements, drove automated OneDrive folder provisioning via Microsoft Graph API, and built a purpose-designed SDR playbook that shortened outbound-to-qualified-lead conversion time.
- Defined product vision, user journeys, and success metrics for CFOInsights AI, Incubation AI, and Occams AI — each automating advisory workflows that previously required senior consultant time.
- Built and shipped internal tools including a DocuSign API integration for automated two-signer engagement letter workflows, an Apollo.io data enrichment tool for SDR research automation, and a social media automation dashboard.

- Owned all executive communication across AI initiatives: presented roadmaps, product trade-offs, and KPI dashboards to CEO and leadership; translated IRS R&D criteria and IEEPA tariff rules into engineering-ready specs.

Business Analyst → Product Owner · Coditro New Delhi, IN (Remote) | May 2020 – Jan 2023

- Acted as de facto product owner for web and mobile features: led user research and stakeholder interviews, then translated findings into wireframes, user stories, and acceptance criteria used directly in sprint planning.
- Sequenced the product backlog by business impact and delivery complexity in partnership with engineering leads, improving on-time sprint delivery and reducing scope creep across two concurrent product streams.
- Embedded Agile/Scrum discipline across two product teams — standardised grooming, sprint review, and retrospective processes, cutting rework cycles and reducing stakeholder escalations.

Earlier Career

Lead CCP · American Express (Jan 2019 – May 2020) | Team Coach · FIS Business Solutions (Nov 2016 – Jan 2019) | Finance Advisor · Tech Mahindra (Aug 2015 – May 2016) | Customer Service · First Source (Feb 2014 – Jan 2015)

6 years across client-facing roles at Fortune 500 financial services firms — built strong foundations in SLA management, compliance documentation, and high-volume operations before transitioning fully into product.

CORE SKILLS

Product Management: Product Strategy & Vision · 0-to-1 Product Development · Product Discovery & User Research · Backlog Prioritization · KPI Definition · Go-to-Market Strategy · Executive Stakeholder Management

AI & Technology: Generative AI · LLM Integration · Prompt Engineering · API Product Design · Microsoft Graph API · Systems Thinking · Data-Informed Decision Making

Domain: B2B SaaS · Fintech · Tax-Tech · Regulatory & Compliance Products · AI-Native Product Development

Tools: Jira · Asana · Figma · Miro · Lucidchart · Office 365

Methodologies: Agile · Scrum · Kanban · Sprint Planning & Grooming · Jobs-to-be-Done (JTBD) · Cross-functional Team Leadership

CERTIFICATIONS & EDUCATION

Professional Scrum Product Owner I (PSPO I) Scrum.org

Certified Kanban Practitioner

Bachelor of Commerce (B.Com) Magadh University, Bihar | 2016–2019