

Ryan Allison

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PROFESSIONAL SUMMARY

Implementation lead for AI-augmented operations in regulated Fintech SaaS, K-12 school choice vertical. I run state-funded disbursement programs where AI is configured inside the operating cadence, not bolted on top. Most recent example: same-workday Claude Code plus Firecrawl MCP enrichment of a 148-vendor onboarding list against a days-to-a-week manual baseline, producing a segmented rollout plan the implementation team prioritized directly. Built the User Enablement function from zero at Student First Technologies; the West Virginia State Treasurer's Office hosts the library publicly at hopescholarshipwv.gov.

CORE COMPETENCIES

- AI-Augmented Implementation
- Regulated Fintech Operations
- Multi-Stakeholder Program Coordination
- Vendor Onboarding & Readiness
- Customer Success Operations
- Enablement Architecture
- Operating Cadence & KPI Reporting
- Audit-Ready Workflow Design

WORK EXPERIENCE

Student First Technologies

Apr 2024 - Present

Director, Customer Success | Bloomington, IN

- Led same-workday AI-assisted enrichment of a 148-vendor onboarding list for a newly acquired Idaho customer against a days-to-a-week manual baseline. Used Claude Code with Firecrawl MCP to crawl each site against a defined schema and write seven additional fields per row back to the source CSV. Produced a segmented rollout plan: **98 vendors fit standard cart-detection, 50 need rework**, with a 148-vendor manual sweep collapsed into a **95-vendor targeted Mastercard follow-up**
- Built the User Enablement function from zero: **50+ platform guides** shipped across 4 user types (families, school admins, education providers, Program Admins) and 2 state programs; library hosted publicly by the **West Virginia State Treasurer's Office** at hopescholarshipwv.gov
- Built and validated a **Claude for Sheets API LLM PoC** for real-time user-issue triage categorization (fully, partially, or not-at-all enablement-addressable); first non-chat, non-embedded AI capability personally configured at the company
- Designed and built the Smartsheet operations-architecture backbone for the state-government ESA platform: **5 workspaces, ~55 sheets, 15 reports, 6 dashboards**; 18-client portfolio scaffolding, three-system ticket integration architecture, 4-organization shared support queue
- Coordinated implementation of the WV Hope Scholarship Program: **32,886 funded student accounts, \$123.5M disbursed**; 48 team members coordinated across 4 organizations
- Helped coordinate support operations achieving **4.85/5.0 CSAT** and 97-98% resolution rates across 1,000+ weekly interactions; fulfillment operations processing **116,099 orders (\$15M+ fulfilled)**

Student First Technologies

May 2023 - Mar 2024

Director, Client Management | Bloomington, IN

- Co-led **\$100M Tennessee ESA program** implementation: 3,900+ students, 91 schools onboarded under state-mandated deadlines
- Designed readiness gates and knowledge systems (Zendesk, YouTube, Smartsheet) that reduced onboarding friction; architected onboarding workflows that met state-mandated launch dates

Stand Together

May 2022 - Sep 2022

Technical Product Manager | Arlington, VA

- Secured **\$220K budget** for product development by defining product vision and stakeholder strategy
- Reduced development costs by **38%** through structured vendor research and negotiation

Stand Together

Oct 2019 - May 2022

Research Manager | Arlington, VA

- Automated Salesforce workflows, reducing process time from 28 days to 2 days (**92% efficiency gain**)
- Built cross-functional programs supporting **\$24.9B+ in donor asset strategy**

SELECTED WORK

IHLA Vendor-Onboarding Enrichment

Apr 2026

Same-workday Claude Code with Firecrawl MCP enrichment of a 148-vendor onboarding list against a days-to-a-week manual baseline. Defined a seven-field schema (cart structure, product mix, Mastercard acceptance, free-text catalog notes) and wrote enriched fields back to the source CSV. Output produced a segmented rollout plan the implementation team prioritized directly.

WV Hope Scholarship Program Implementation

Apr 2024 - Present

Implementation of a state-funded \$123.5M disbursement program serving 32,886 students. The West Virginia State Treasurer's Office adopted the User Enablement library wholesale and hosts it publicly at hopescholarshipwv.gov.

SFT Operations-Architecture Backbone

Apr 2024 - Present

Designed and built the Smartsheet operations-architecture backbone for a state-government ESA platform: 5 workspaces, approximately 55 sheets, 15 reports, 6 dashboards. Includes 18-client portfolio scaffolding, three-system ticket integration architecture, 4-organization shared support queue, and a 65-row implementation project plan tracked across four phases.

EDUCATION

M.A., Political Science

University of Louisville

B.A., English

Indiana University Bloomington

CERTIFICATIONS

Pragmatic Certified Product Manager (PMC-III)

Pragmatic Institute

Lean Six Sigma Green Belt

Purdue University

Disruptive Strategy

Harvard Business School Online

TOOLS & SKILLS

AI Tools: Claude Code, Firecrawl MCP, Claude for Sheets, Descript

Operations Platforms: Smartsheet, Asana, Jira, Miro, Lucidchart

CRM & Support: Salesforce, Zendesk, Zapier

Domains: AI-augmented operations, regulated Fintech SaaS, compliance workflows, vendor management, enablement architecture, customer success operations