

Travis Roe

Senior Product & Pre-Sales Leader | Problem Solver | Analyst | Trusted Partner

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Professional Summary

Accomplished product and solutions leader with 20+ years spanning sales engineering, product management, and leadership roles. Known for bridging business and technology, diagnosing complex challenges, and delivering measurable outcomes. Proven ability to enable revenue growth, modernize platforms, and craft compelling solution stories. Energized by customer engagement, consultative problem-solving, and turning unstructured needs into actionable solutions.

Core Competencies

Pre-Sales Solution Engineering | SaaS Growth & Customer Adoption | Product Strategy & Market Readiness | Consultative Sales & Customer Engagement | Technical Storytelling & Demos | Revenue Growth & Sales Enablement | Cross-Functional Leadership | Data-Driven Decision Making | AI & Emerging Technology Application

Professional Experience

EOX Vantage | Senior Director of Product (2024 – Present)

- Brought Taruvi platform to market, modernizing software development practices and integrating AI-driven innovation.
- Introduced product requirements discipline, eliminating solution gaps and increasing adoption of new features by 80%.
- Co-developed licensing model with CRO, reducing quoting time from weeks to hours.
- Designed prototypes and mockups using AI-assisted coding agents to accelerate concept validation.
- Built an internal education series for insurance, improving workforce confidence in domain knowledge.
- Implemented ClickUp for productivity and knowledge management, surfacing bottlenecks and enabling efficiency.
- Developed concierge chatbot for customer-facing web presence, clarifying “what we do” and “who we work with.”

Hyland Software | Senior Product Manager (2018 – 2024)

- Owned strategy and roadmap for ShareBase, Document Filters, Hyland Experience Platform, and Hyland Cloud.
- Increased ShareBase ARR average by 176% (2017–2020) by refining customer segmentation and aligning product development.
- Launched Hyland’s first product usage and analytics tracking, enabling data-driven development and adoption decisions.
- Led product readiness for AWS becoming the default Hyland Cloud provider; enabling 7,000+ customers from on-premise to SaaS.
- Championed data science practices within product, establishing frameworks for experimentation and segmentation.
- Oversaw successful launches: ShareBase Search, Tasks, Link Experience, Hyland Experience Platform (Nucleus), Document Filters trial.
- Guided cross-functional readiness across marketing, sales, UX, support, legal, and engineering for multiple feature launches.
- Orchestrated corporate COVID-19 response with ShareBase, increasing customer acquisition by 30%.

Hyland Software | Sales Manager (2016 – 2018)

- Led global sales effort for ShareBase, Hyland's first subscription-only SaaS product.
- Pioneered SaaS customer journey best practices, delivering above-average net retention rates.
- Consistently exceeded sales targets, closing six-figure annual subscription deals across industries.
- Acted as key liaison between customers and development teams to identify opportunities and competitive differentiators.
- Designed and implemented customer journey operations, enhancing experience beyond the product.

Hyland Software | Solution Engineering Manager (2015)

- Managed and developed a team of technical pre-sales engineers for banking and insurance verticals.
- Team influenced \$15M in software revenue, a 55% YoY increase.
- Presidents Club recipient for exceeding team revenue goals.
- Built scalable training and shadowing programs to cross-train engineers in multiple verticals.

Hyland Software | Solution Engineering Team Leader (2009 – 2014)

- Created and launched the OnBase Experience Center, transforming it from idea to \$3.5M influenced revenue in its first year.
- Grew OnBase Experience Center influenced revenue to \$5.5M in year two, a 157% increase.
- Won Hyland's Innovation Award (2013) for developing customer listening solutions to improve product development.
- Mentored and developed a team of 10 sales engineers.
- Built and managed pre-sales demo environments, knowledgebases, and proof-of-concept programs.
- Consistently achieved revenue targets \$10m+

Hyland Software | Solution Engineer (2006 – 2008)

- Supported Financial Services and Insurance global account teams with technical pre-sales activities.
- Consistently met annual revenue influence goals (\$5M+).
- Led demos, proof of concepts, and RFP responses, ensuring customer alignment with OnBase solutions.

Agilysys | Account Executive (2002 – 2005)

- Managed channel partner accounts across Hewlett Packard, IBM, and Intel product lines.
- Consistently exceeded sales targets, with multiple six-figure monthly sales achievements.
- Recruited and developed business partners and channel resellers in open-source markets.
- Awarded "Best Quarter" for achieving 300% of forecast in Q4 2004.

Education & Development

- University of Dayton, Bachelor of Science – 2002
- Product Management University, Portfolio Product Management – 2021
- Amazon Web Services (AWS), AWS Certified Cloud Practitioner – 2022
- IBM, Data Fundamentals – 2024
- IBM, Artificial Intelligence Fundamentals – 2024
- Continuous professional development in SaaS strategy, AI applications, and consultative sales methodologies.
- Mentor and corporate educator, leading training programs for product, sales, and solution engineering teams.

Selected Achievements

- Increased ShareBase ARR by 176% through targeted product strategy.
- Launched OnBase Experience Center, driving \$5.5M influenced revenue within 24 months.
- Modernized EOX platform, accelerating adoption and shortening sales cycles.
- Presidents Club recipient (2015) and Innovation Award winner (2013).
- Coached and developed multiple teams that consistently exceeded revenue targets.

Contact

For professional opportunities or networking: <https://www.linkedin.com/in/travis-roe/>