

Kristopher Wong

Product Director · Microsoft Partner Ecosystem · AI-Augmented SaaS

236 Summerview Terrace, Ottawa, ON K4P 0E9
(613) 866-9764 · kristopher.j.wong@gmail.com
linkedin.com/in/kristopherwong · github.com/kriswong1

01 PROFILE

Product leader with 15+ years across the Microsoft cloud, licensing, and partner channel — now building AI-augmented SaaS at the category level. Currently lead **Navigator** at Surveil, establishing the **Partner Sales Intelligence** category for distributors, resellers, and MSPs. Equally effective as a hands-on senior IC (PRDs, discovery, outcome-based metrics, AI-assisted tooling) and as a cross-functional leader influencing engineering, design, GTM, and regional sales without formal authority. Deep expertise in Azure / M365 cost optimization, FinOps, GDAP, CSP channel mechanics, and partner-hierarchy economics.

02 CORE SKILLS

Product Craft — Strategy & vision, product discovery, problem framing, PRDs, Shape Up, outcome-based metrics & OKRs, roadmapping, commercial & contract modeling, EULA, prototyping

Microsoft Ecosystem — Azure, M365, AVD-adjacent, CSP / Indirect Provider motion, MPC / Partner Center API, GDAP orchestration, licensing optimization (EA, MCA, CSP), Co-sell, SAM, MPC Partner hierarchies

Software Licensing — Tier-1 publisher expertise (Oracle, IBM, Microsoft contracts), technical licensing, license optimization, audit defense

AI-Driven Product Development — AI/ML capability design, NLP UX patterns, predictive scoring, recommendation systems, responsible AI integration, AWS Bedrock, Azure AI Foundry, agentic PM tooling

Cloud & Cost Optimization — FinOps practices, Azure cost management, RI / Savings Plan optimization, licensing rationalization, “zombie” workload identification, SaaS FinOps

Leadership & Influence — Cross-functional leadership without formal authority, regional GTM partnership (NA / EMEA), partner enablement, executive communication, high-ambiguity environments

03 EXPERIENCE

Product Director — Navigator | Surveil

Feb 2023 – Present

Lead product strategy, roadmap, and execution for **Navigator**, a Microsoft partner Revenue Intelligence platform that helps distributors, resellers, and MSPs find, model, and monetize opportunities across their customer estates. Manage one direct PM report and influence a cross-functional team of two engineers, one designer, and post-sales via dotted-line relationships.

Product strategy & category creation

- Defined and now own the **Partner Sales Intelligence** product category, built on a proprietary **See It / Find It / Do It / Scale It / Prove It** strategic framework and codified in a phased multi-year roadmap (Deep Microsoft → Platform Foundation → Multi-Vendor).
- Authored Navigator's vision, strategy, PRDs, spec work, commercial modeling, EULA, and contract structures. Designed a programmatic **Partner Activation Ladder (L0–L4)** that ties product leading indicators to sales outcomes and phase exit criteria.
- Positioned Navigator as a differentiated platform for scaling FinOps at speed in the SMB segment — a capability gap not previously addressed by incumbent solutions.

Scale & outcomes

- Took Navigator from concept to production SaaS platform serving **50+ partners** with visibility into **280,000+ customers**, including many of the world's biggest Indirect Providers (distributors).
- Grew paying end-customer base from **~800 to 2,200+** and Monthly Active Users from **0 to ~800** between Feb 2023 and Dec 2025.
- Surfaced **\$5M+ in identified and realized partner revenue** through Navigator intelligence. Additionally contributed product design across Surveil's M365 and Azure products, whose combined recommendation capabilities have surfaced significant customer cost-saving opportunities over three years.

AI & intelligent automation

- Designed and shipped a proprietary **recommendation IP layer** across Surveil's M365 and Azure products that outperforms Microsoft Advisor by grounding guidance in deterministic, factual evidence chains rather than probabilistic and heuristic rules. Established methods for measuring usage of otherwise unmeasurable M365 licenses, optimal RI / Savings Plan purchase strategy, and Azure “zombie” workload identification.

- Leading development of an **NLP-driven campaign builder** (in beta) that collapses a 16-field configuration task into a natural-language conversation — chosen over a chatbot paradigm as a deliberate design decision to reduce user mental load rather than add novelty. Built on AWS Bedrock and Azure AI Foundry.
- Roadmapped and guided implementation of predictive churn scoring, tenant-level automated recommendations, cohort benchmarking against the 280K-organization proprietary dataset, and AI-assisted campaign targeting.

Go-to-market & partnerships

- Lead GTM strategy in partnership with regional business leads across **NA and EMEA**.
- Designed a proprietary **GDAP orchestration method** that collapsed downstream partner onboarding from days to minutes — instrumental in winning the lion's share of new partners on the Surveil platform.
- Shipped major capabilities including **Bulk Onboarding, Wallet Share Analysis, PEC Reconciliation, GDAP Orchestration, and Azure/M365 Takeover Modeling**.
- Established a strategic partnership with **Work365** (Microsoft billing provider) for downstream partner billing/invoicing workflows.

Discovery

- Spend ~30% of capacity in structured discovery with partners and end customers — the primary input to roadmap prioritization, problem framing, and hypothesis validation.

Senior Client Success Manager | **MetrixData 360**

Feb 2021 – Feb 2023

Led the delivery organization responsible for SAM, FinOps, and Azure engagements, driving standardization, process maturity, and ARR expansion. Served as the firm's Azure and cloud subject-matter expert for cost management and optimization.

- Directed the internal product roadmap for **Synapse**, client-facing reporting functions, and the customization of **Surveil / SLIM 360**.
- Originated and delivered **MetrixData 360's first FinOps Managed Service**, establishing a new recurring revenue line for the firm.
- Led partnership development with strategic third-party organizations and partnered with Marketing on Proof-of-Value campaigns for M365 / O365 and Azure.
- Delivered public webinars on value creation within the SAM discipline and implemented a closed-loop account review process at project close-out that measurably improved downstream account expansion.
- Managed a team of three delivery consultants.

Software Optimization / Licensing Manager | **Long View Systems**

Nov 2017 – Feb 2021

Productized Long View's SAM consulting practice into a managed service offering (**Sync Up**), scaling it from MVP to a stable revenue line generating **\$500K+** annually.

- Developed reusable tools, templates, and delivery processes that scaled SAM services across customer segments.
- Authored Licensing Briefs that equipped internal sales and Go-To-Market specialists with the technical depth to identify, qualify, and expand opportunities.
- Led contract negotiations with tier-1 software publishers and delivered audit defense engagements that **averted more than \$50M in potential audit fines within the first 12 months**.
- Delivered workshops on Software Asset Management at ITAM Review and IAITAM international conferences.

Software Asset Management Consultant | **Beaconize Inc.**

Jan 2016 – Nov 2017

Advised enterprise clients on IT value creation across ITAM, ITSM, ITFM, IT sourcing, and IT strategy.

- Delivered audit defense training and hands-on engagement support against tier-1 software publishers. Led an **Oracle RDBMS** audit defense for a multinational client that **resulted in more than \$15M in liability savings**.
- Led an **IBM** audit engagement for a major financial institution, establishing a defensible position for subsequent negotiations with third-party auditors and the publisher.
- Led license acquisition and renewal negotiations on clients' behalf, and advised senior IT leadership on architecture decisions that carried material licensing exposure.

IT Asset Management Lead | **RAPA Consulting**

May 2015 – Jan 2016

Led the firm's Software Asset Management practice. Developed an end-to-end SAM lifecycle synthesizing ISO 19770-1, Microsoft Operations Framework, and IAITAM best practices. Delivered publisher rationalization, internal audit programs, executive briefings, and enterprise policy frameworks across client engagements spanning Windows, macOS, and Solaris environments.

Program Manager / Business Analyst | **Canadian Medical Association — PMO**

Apr 2014 – May 2015

Designed and launched an enhanced enterprise Program Management Office and led a comprehensive, organization-wide program review that shaped CMA's long-term strategic direction.

- Led a **full-operations program review** across CMA's entire business portfolio, assessing every commercial subsidiary and operational function against the association's not-for-profit mandate and long-term strategic plan. Produced formal

recommendations identifying which operations required divestiture to preserve CMA's non-profit status and refocus the organization on its core advocacy mission.

- The program review's analysis contributed directly to CMA's strategic decision to divest **MD Financial Management**, its wealth management subsidiary (AUM ~\$49B) — sold to **Scotiabank in October 2018 for \$2.585 billion**, one of the largest not-for-profit divestitures in Canadian history.
- Built the business analysis body of knowledge for the ePMO, facilitated an organization-wide transformation initiative, and re-aligned active projects against a new three-year organizational vision.

IT Business Relationship Manager / Service Owner | General Dynamics Canada & C4S Sep 2010 – Apr 2014

Managed **\$5–7M per year** of transformative IT investment, aligning project and process design to enterprise financial, quality, and schedule commitments.

- As **Service Owner**, led a cross-functional team of five (legal, financial, and technical specialists) managing **~\$80M annually** in software assets across the GDC4S enterprise. Negotiated with tier-1 software publishers, championed the enterprise IT Asset Management program, and led both internal and external audit engagements.
- As **Business Analyst**, delivered **\$3.5M+ year-over-year** savings in infrastructure software maintenance and produced CapEx / OpEx analysis that shaped strategic investment decisions.

Business Analyst — Customer Care CoE | Alcatel-Lucent Canada Jul 2009 – Sep 2010

Coordinated supplier standards and data feeds across EMS / OEM partners, migrated proprietary supplier data into a unified data warehouse, and led ETL compliance efforts against Telcordia standards.

04 PUBLICATIONS & PUBLIC WORK

- **Co-author** — Applying the FinOps Framework to SaaS, FinOps Foundation Working Group · finops.org
- **Co-author** — FinOps for Software as a Service (SaaS), FinOps Foundation Working Group · finops.org
- **Co-author** — Microsoft Licensing Management Guide, FinOps Foundation Working Group · finops.org
- **Co-author** — FinOps for SaaS: Best Practices and Adopting FOCUS, FinOps Foundation Working Group · finops.org
- **Contributor** — IT Asset Management (ITAM) Working Group, FinOps Foundation
- **Past speaker** — IAITAM, “Negotiating a Software Audit”
- **Past speaker** — IAITAM, “Art of War: Winning the Software Audit”
- **Open-source project** — CorticalStack (github.com/kriswong1/corticalstack): an Obsidian-backed “second brain” that turns Shape Up-style product work into unlimited context for AI agents, producing AI-native PRDs and specs that agents can implement directly. Runs a Shape Up pipeline (Idea → Frame → Shape → Breadboard → PRD), translates meeting notes into action items via key-phrase detection, and serves as a persistent local context layer for day-to-day PM work.

05 CERTIFICATIONS

FinOps Practitioner

FinOps Foundation

IAITAM CSAM

Software Asset Manager

ITIL v3 (2011)

Foundation

BRMI BRMP

Business Relationship Mgmt.

Previously held TOP SECRET (Canada) security clearance — lapsed Nov 2020, renewable if required.