

ROSHAN CHANDRASENA

ENTERPRISE AI COMMERCIALIZATION LEADER | STRATEGIC ACCOUNTS | FINANCIAL SERVICES

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Canada-based | Canada/U.S. Remote | Open to business travel

#1 of 40+ AEs \$4M+ cash collected Typically 1.5-3x quota 5 live AI applications

EXECUTIVE PROFILE

Enterprise AI commercialization leader with 18+ years spanning enterprise sales, fintech, SME lending, capital markets, company building, and large-team leadership. Aligns product, sales, implementation, and customer economics with the technical depth to interrogate production AI behavior.

Top-ranked performance at Planswell expanded the mandate from revenue into pricing, enterprise GTM, pilots, and commercial direction across five live AI applications. Independently built C2 Lattice for multi-agent coordination, Relay for secure AI workflows, and Area10 for point-in-time economic intelligence - inspectable proof of systems judgment.

CORE CAPABILITIES

Go-to-Market Commercial Leadership | Enterprise Sales | Strategic Accounts | Cross-Functional GTM | Zero-to-One GTM | Product Commercialization | Executive Alignment | Pricing & Packaging | Pilot Design | Adoption & Expansion

AI & Financial Services Generative AI | LLMs | AI Agents | Multi-Agent Systems | MCP | Conversational & Voice AI | RAG & Vector Search | Agent Evaluation & Optimization | Workflow/Decision Trees | AI Governance & HITL | Insurance | Banking | Financial Planning | Fintech | Capital Markets

Technical Python | TypeScript | SQL | LangGraph | FastAPI/Pydantic | Next.js/React | PostgreSQL | SQLite/DuckDB | Docker | Git/GitHub | Data Pipelines | Testing/CI/CD | Observability | Point-in-Time Analytics

PROFESSIONAL EXPERIENCE

PLANSWELL | **Financial-Planning SaaS** | Toronto, ON | Jan 2023-Mar 2026

GTM Consultant | Nov 2025-Mar 2026

- **Executive GTM advisory.** Retained after the operating role to advise leadership on pricing, pipeline, active opportunities, execution, and coaching; converted pilot and frontline evidence into packaging, qualification, enablement, and implementation decisions.

Founding Enterprise Account Executive | Jul 2025-Oct 2025

- **Built the enterprise motion.** Secured the first four enterprise engagements for the white-label offering; shaped business cases, aligned executives and cross-functional stakeholders, set pilot KPIs, led implementation and training, and brought the initial pilots live.
- **Pricing and packaging redesign.** Rebuilt price points and packages around systems, support, checkpoints, and account-management requirements; introduced larger and custom solutions and drove cross-functional approval.

Senior Account Executive | Jan 2023-Jun 2025

- **Ranked #1 among 40+ account executives.** Generated \$4M+ in cash collected across the Planswell tenure and met or exceeded quota every quarter - most often at 1.5-3x target, with some quarters higher.
- **Customer economics and retention.** Accounts produced roughly 2-3x team-average cash collected per customer. Redesigned qualification, onboarding, follow-up, and retention workflows later adopted organization-wide, helping lift team-wide customer value while modestly improving retention.
- **Raised team performance while carrying the top number.** Built sales onboarding and ramp across the 40+ person organization and coached representatives into stronger performance while maintaining the top individual number.

PLANSWELL - AI & GTM SCOPE ACROSS TENURE Field performance became the evidence base for product behavior, enablement, customer-process redesign, and release decisions across the progression.

- **Five live conversational-AI applications.** Helped develop and operate voice prospecting, sales/nurture, adaptive sales training, self-service financial-plan guidance, and configurable advisor-prospecting applications across lead, seller, advisor, and client journeys.
- **AI behavior and commercial readiness.** Led commercial-readiness decisions for customer-facing AI behavior - workflows, decision trees, qualification logic, prompts, configuration, voice and latency, routing, and human escalation - and helped guide model-weight and configuration changes using call evidence and scorecards. Defined or reviewed evaluation scorecards and release acceptance within the 6-8 person product and engineering group; engineering owned production code and infrastructure.
- **Conversational-AI optimization.** Used calls, transcripts, scorecards, funnel analytics, and continuous testing to mature outbound voice operations to 1,000+ attempts per day after an 18-month ramp, improving qualified meetings, post-handoff close rates, order size, lead quality, and seller capacity.

INDEPENDENT PROPRIETARY TRADER | **Principal** | Toronto, ON | 2018-2022

- **Systematic trading and risk management.** Researched and traded systematic equity and derivatives strategies with direct P&L responsibility, using point-in-time data, out-of-sample validation, position sizing, and risk controls to separate signal from noise.

THINKING CAPITAL / DRIVEN | **Senior Account Executive** | Montreal, QC / Remote | 2017-2018

- **SME financing across industries.** Reached the top five of a 30+ person sales organization within the first year; originated and funded approximately \$1M in financing, an estimated \$250K+ in company revenue, with typical facilities of \$25K-\$300K for investment, buildouts, growth, and inventory.
- **Underwriting judgment alongside the sale.** Assessed operating models, cash flow, use of funds, and repayment capacity across nearly every major industry, then recommended structures matched to the actual need.

NOTA BENE CAPITAL LLC | **Founder, Fund Manager & Head Trader** | New York, NY | 2014-2017

- **Built and ran a capitalized investment fund.** Founded a Delaware-domiciled private investment business, established the mandate and trading operation, and owned research, portfolio construction, risk, execution, and investor materials while coordinating independent front-, middle-, and back-office providers and a fund administrator.

PLATINUM PT | **Founder & Operator** | Toronto Area, ON | 2010-2014

- **Scaled a multidisciplinary healthcare business from zero.** Built two wellness centres to 20+ staff, including 16-18 practitioners across physiotherapy, massage therapy, naturopathy, and orthotics; reached a \$30K monthly run rate within 10 months and exceeded \$1M in peak annual revenue, owning P&L, hiring, acquisition, and operations before moving into finance.

FUTURE SHOP / BEST BUY | **Sales, Operations & Store Leadership** | Toronto, ON | 2007-2010

- **Turnarounds at national scale.** Moved home theatre, mobile, and computing departments from approximately 120th or lower into the national top five, several reaching #1, and ranked top five among 135+ sales managers; held leadership responsibility at the company's largest Canadian store with 300+ people in scope, including the first \$2M+ store day in company history, with \$1M+ from home theatre; selected to train teams nationally.

SELECTED AI & DATA SYSTEMS

C2 Lattice | **Local Multi-Agent Coordination Control Plane** - public source at github.com/GlobalCan/c2-lattice; private build began Jan 2026, hosted CI green as of Aug 2026. Built a localhost-only, Python-standard-library broker and MCP server with 22 tools spanning task DAGs, peer discovery, HMAC identity, RBAC, messaging, versioned memory, file locks, worker spawn, escalation, heartbeat recovery, SQLite WAL, and a responsive dashboard. Validated by 465 named local tests across six suites, separate E2E coverage, 28/28 clean-checkout two-client acceptance, and green hosted CI on Ubuntu/Python 3.12 and 3.13.

Area10 | **Economic Intelligence Platform.** Built vintage-aware, point-in-time analysis across 39.1M observations and 161,525 economic series, with ingestion controls, source and freshness monitoring, incident tracking, time-series analysis, and durable decision records that separate what was knowable then from revised hindsight.

Relay | **Private AI Workspace.** Built and operates a private, single-tenant environment with passkey authentication, multi-model routing, grounded file workflows, durable context, retrieval, evaluations, cost visibility, backup/restore, and on-demand dedicated-GPU inference across Next.js, FastAPI, PostgreSQL, LiteLLM, vLLM, and Docker.

PROFESSIONAL PROGRAMS & UNIVERSITY COURSEWORK

MIT Professional Education | **Applied AI and Data Science Program** | 2026 - Capstone: compared six deep-learning approaches for facial-expression classification on 48x48 grayscale images; the purpose-built five-block CNN reached 76.56% test accuracy, outperforming frozen ImageNet models in that setting. Portfolio: mygreatlearning.com/eportfolio/roshan-chandrasena

MIT Professional Education | **Applied AI & Data Science Hackathon** - Third Place | 2026 - Built a leakage-aware ensemble evaluated across 35,602 held-out predictions

MIT Sloan School of Management | **Applied Agentic AI for Organizational Transformation** | 2026

Stanford Online / Stanford HAI | **Generative AI: Technology, Business, and Society** | 2026

IFSE Institute | Exempt Market Proficiency | 2020

McMaster University | Coursework in Life Sciences and Political Science | 2002-2005 - President, McMaster Debating Union; top-10 national speaker ranking