

Jonathan Montes

Manager, Solutions Engineering — *Digital Experience* & *Applied AI*

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For a decade I've worked where **digital experience** meets **applied AI** — building and coaching pre-sales teams, winning eight-figure enterprise deals, and shipping production AI systems with my own hands. I translate customer-journey analytics into product strategy as fluently as I architect LLM agents on Claude, and I lead teams that do both.

Digital Experience

12+ years in journey analytics, session replay, Voice of Customer, and CX optimization for Fortune 500 fintech, retail, and media. 120%+ quota three years running at Contentsquare.

Contentsquare · Glassbox · Tapestry · Wells Fargo · TracFone

Applied AI

Hands-on builder of production agentic systems on Claude, and founding Solutions Engineering leader for Conviva's AI-native platform — owning methodology, evals, and integration architecture.

Agentic systems · Multi-model routing · RAG · Anthropic & OpenAI SDKs

EXPERIENCE

Dec 2025 — Present

Conviva

APPLIED AI

Solutions Engineering Leader

- Founding pre-sales leader — built the Solutions Engineering function for Conviva's agentic AI platform from scratch: hire, onboard, and coach SEs; establish discovery, model-evaluation, POC, and value-engineering methodology for an AI-native motion.
- Partner with Sales, Product, and Engineering leadership to set team KPIs and align technical positioning across enterprise verticals.
- Architect demonstrations and integration POCs spanning agentic AI APIs, real-time data pipelines, and downstream production systems.

Aug 2022 — Nov 2025

Contentsquare

DIGITAL EXPERIENCE

Expert Solutions Consultant

- One of four globally to hold the **Expert SC** designation — senior technical lead and player-coach for the Americas SC team, mentoring SCs on discovery, demos, and competitive deal strategy.
- Exceeded quota by 120%+ for three consecutive years**; managed a \$1M-\$5M ARR portfolio and influenced \$10M+ in net-new pipeline across fintech, retail, and media (Discover, USAA, Synchrony).
- Built enterprise ROI and governance frameworks adopted globally; translated 50+ enterprise evaluations into product roadmap input with Engineering.

Jan 2022 — Aug 2022

Wells Fargo

DIGITAL EXPERIENCE

Strategic Advisor to SVP of Digital

- Drove data unification and digital analytics strategy across five flagship programs in a heavily regulated FS environment — accelerated executive reporting cycles by 40% and standardized KPIs, instrumentation, and tooling patterns across engineering teams.

Jun 2021 — Jan 2022

Tapestry

DIGITAL EXPERIENCE

Senior Manager, Global Digital Experience

- Led a cross-functional analytics and CX team across three retail brands (Coach · Kate Spade · Stuart Weitzman); designed predictive customer-journey programs that lifted checkout conversion and AOV.
- Partnered with C-suite and SVP stakeholders to translate behavioral data into product and engineering strategy.

Nov 2018 — Jun 2021

Glassbox

DIGITAL EXPERIENCE

Sep 2015 — Nov 2018

TracFone Wireless

DX → AI

Senior Manager, Global Business Insights & Presales

- Led pre-sales technical strategy across North America, LATAM, and EMEA for major fintech accounts (Bank of America, JPMorgan, Capital One, Citi, USAA); coached SCs on discovery, demos, and competitive positioning.
- Surfaced **\$10M in incremental revenue** through behavioral analytics and session-replay POCs; shortened enterprise sales cycles by 25-30%.
- Designed reusable POC architectures and discovery frameworks adopted as SE standards.

Operational Research & Digital CX Manager

- **Managed 40 people across 4 teams**; owned Voice of Customer, digital analytics, and CX operations for 25M+ subscribers.
- Architected a real-time, sub-second agent-context layer consolidating 5+ data sources — cut average handle time by 30 seconds and saved **\$3M+ annually**. An early ancestor of today's AI agent-assist patterns.

Earlier: Research Analyst & PMO roles (2010-2015) — CX analytics, BI, and SDLC delivery for large consumer businesses.

SELECTED AI PROJECTS

Bartie

Production personal AI orchestrator (WhatsApp + native Android) on a Claude orchestrator running tool-use loops across 18 tools / 107 actions. Multi-model routing, real-time webhooks, voice mode (EN/ES/IT), nightly self-improvement loop. TypeScript · GCP · Supabase · Anthropic SDK.

[View architecture →](#)

Dechiva

Agentic travel assistant coordinating Claude and OpenAI in parallel — ingests reservation screenshots via Claude vision, normalizes itineraries across groups, recommends activities grounded in context. RAG + custom evals.

[Visit dechiva.com →](#)

Enterprise Demo Tooling

Production-grade GenAI demos delivered to enterprise retail and fintech prospects — built with Anthropic and OpenAI APIs, LangChain and LlamaIndex agent SDKs, prompt-engineered for vertical-specific use cases.

[More at askjon.me →](#)

CORE COMPETENCIES

DIGITAL EXPERIENCE & ANALYTICS

Journey Analytics
Session Replay
Voice of Customer
CX & Conversion Optimization
Behavioral Data & AOV
Experimentation

APPLIED AI & ENGINEERING

LLMs & SLMs · Agentic Systems
Tool-Use Loops · Multi-Model Routing
RAG · Custom Evals
Anthropic SDK · OpenAI APIs
LangChain · LlamaIndex
TypeScript · Python

PRE-SALES LEADERSHIP

Team Hiring & Coaching
SE Methodology & Enablement
Discovery & Proof-of-Value
ROI / Value Engineering · MEDDPICC
C-Suite Engagement (CIO/CTO/CDO)
Americas (incl. LATAM) & EMEA

EDUCATION & CERTIFICATIONS

B.A. Marketing & Publicity

Politécnico de la Costa
Atlántica, Colombia

MEDDPICC Elite · Command of the Message · AI / GenAI Fundamentals · Splunk Expert
· IBM Tealeaf Architect