James Weis

AI Strategist | Technical Operator

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SUMMARY

AI strategist and technical operator who helps organizations design, deploy, and adopt technology systems that transform their operations. 14 years across 27 client engagements spanning renewable energy, cybersecurity, child welfare, SaaS, and scientific instrumentation.

Core strength: bridging the gap between business leadership and technical execution — scoping high-value AI use cases with the C-suite, then architecting and shipping the solution. Background spans enterprise operations management, agency building, and AI-powered platform development.

Currently: CTO & Co-Founder at Orchestraight (AI sales platform). Also: Principal Consultant at Tactic, specializing in AI strategy, operational transformation, and team enablement.

EXPERIENCE

CTO & Co-Founder — Orchestraight
2024 — Present

Designed and deployed an AI-powered sales platform that combines behavioral science with AI to help sales teams sell the way buyers actually buy — resulting in documented 15-30% win rate improvements.

- Translated neurostrategy and behavioral science principles into a working AI product, from concept through two major releases
- Owned end-to-end product development: strategy, architecture, implementation, and deployment across two major releases

Founder & Principal Consultant — Tactic Consulting
2023 — Present

Deep technical consulting practice and Platinum HubSpot Solutions Partner. 27 clients across 6+ industries; engagements spanning AI strategy, HubSpot implementation, and operational transformation.

- HubSpot expertise across all hubs — consolidating fragmented systems into unified, automated platforms teams actually use
- AI strategy and platform modernization: identifying high-value use cases, designing AI-powered workflows, and custom integrations
- Enablement-first model: recurring work sessions where client teams build alongside me, creating power users who own the system

Founder & CEO — Revamp Agency
2015 — 2022

Built a full-service marketing agency from solo operation to a 10-person team (5 FTE, 5 contractors). Learned how to translate business problems into repeatable, scalable solutions — and how to build and manage a team that delivers them.

Marketing Manager — Legrand (North America)
2012 — 2015

Managed CRM (Salesforce) and marketing automation (Pardot) for a global enterprise. Built channel partner marketing programs and trade show strategy across international markets.

Pivot Energy / SunCentral — Renewable Energy
`Jul 2020 – Jan 2025`

4.5-year engagement. Transformed fragmented operations into a unified platform. Consolidated 4+ disconnected tools into HubSpot Enterprise. Designed custom API integration between proprietary solar software and CRM. Automated workflows managing 150MW of community solar.

King of Pops — Food & Beverage / Franchise
`Dec 2022 – Present`

Three phases; returning client. CMS migration, franchise lead generation (38+ franchises, 6 states). Currently leading full platform modernization — headless CMS, edge-first infrastructure, custom AI capabilities.

Galtra Solutions — Data Center Infrastructure
`Aug – Nov 2025`

End-to-end enterprise platform deployment from zero: content platform, CRM, sales pipelines (Sandler methodology), vendor portal. Deepest single-client enablement — trained team to full independence.

Primary — Cybersecurity
`Nov 2024 – Present`

Multi-project executive engagement. Partnered with CRO Rich Spring (former SVP, Symantec) to establish foundational sales operations. Sales Hub, knowledge base, PandaDoc CPQ, Jira integration.

KVC Health Systems — Nonprofit / Child Welfare
`Sep 2024 – Jun 2025`

Multi-entity platform configuration for 2,800-person org across five states. Designed segmentation without cross-contamination of joint venture data. M365 consulting and cybersecurity guidance.

Exum Instruments — Scientific Instrumentation
`Jun – Nov 2025`

Platform consulting and content deployment supporting transition from early-stage startup to commercial scale. Complex B2B sales cycle enablement.

EDO, Inc. — TV Advertising Analytics
`Mar – Apr 2023`

Rapid 4-week platform migration. Freed engineering team from content management. Trained marketing team for full self-sufficiency.

Additional: Keep Interacting, CyberVenger, Varello, ASAP Labs, The Sports Marketer, Blue Outcomes, HighFlyerHR, Nooks and Socials, Rooted Architecture Studio, Creative Play Network, and others.

PRODUCTS BUILT

Orchestraight

AI-powered sales platform built on neurostrategy. Partnered with CEO to take AI product from concept through two major releases. CTO & co-founder.

Friday — AI Agent

Personal AI agent connecting Claude, graph memory, Slack, and integrated tooling. Built from scratch to understand agent architecture firsthand.

King of Pops — Platform

Headless CMS (Sanity) + Cloudflare Workers + custom AI. Leading modernization of established business to edge-first, AI-ready architecture.

TECHNICAL SKILLS

Infrastructure: Cloudflare Workers, D1, KV, R2, Queues, Durable Objects

Frontend: React, React Router v7, TypeScript

Backend: Hono, Drizzle ORM, Bun, Node.js, Ruby on Rails

AI & Agents: Claude API, Claude Code, custom agent architectures, RAG patterns, prompt engineering

Data: Graph databases (LadybugDB), PostHog analytics, structured logging

CRM & Operations: HubSpot (all hubs — 14 yrs), Salesforce, Pardot, PandaDoc

CMS: HubSpot Content Hub, Sanity, WordPress, Shopify

Microsoft: Microsoft 365 administration and consulting

Integrations: HubSpot API, Jira, PandaDoc, Zapier, custom REST/webhook

DevOps: Docker, Git, CLI-first workflows

CERTIFICATIONS

• HubSpot Certified Trainer

• HubSpot Implementation for Partner

KEY STATS

27 clients across 6+ industries

3 products built & shipped

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