

# Robert J. Barkman, MBA

## Business Executive

### CONTACT



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Charlotte, NC USA



[LinkedIn](#)

### EDUCATION

**MBA in Business Administration/College of William & Mary, Mason School of Business**  
Williamsburg, VA, USA  
**May/2006**

**BS in Industrial Engineering/University of Tennessee**  
Knoxville, TN, USA  
**May/2001**

**Six Sigma Black Belt Certification/American Society of Quality (ASQ), 2462**

### SKILLS

Entrepreneur  
Lean Six Sigma  
Agile/Scrum  
Change Management  
Key Stakeholder Liaison  
Metric Development  
Process Improvement  
Project Planning Lifecycle  
Resource Management  
Angel Investor

### SUMMARY

Executive leader with extensive responsibilities in various high-level positions in the financial services industries. With twenty-plus years of result-proven experience in operations, business development, and client delivery, able to foster positive relationships with key stakeholders. A solutions-oriented visionary with experience in several functions including strategic planning, technical product enhancement, and project management which positively impacted customer experience and improved financial results.

### PROFESSIONAL EXPERIENCE

**RL Consulting Group | May 2020 – Present**  
**Managing Partner / Management Consultant** – Charlotte, NC  
**CA Educational Savings Scholarship Program Launch**

- Partner with the client's investment team to establish the CA scholarship investment vehicle.
- Establish operational activities in accordance with the contract and manage the client's enterprise's new product approval procedure and leverage findings for operational success.
- Provide thought leadership, and consulting to the client's CA business partners to help establish operational activities and risk management plans.
- Identify technology partnership strategies with internal technical partners and CA's technical vendor to ensure compliance.

#### **Trust Platform Conversion**

- Conduct business readiness for trading and investment teams to ensure integration and data flow in preparation for launch.
- Provide the voice of the customer/product owner with technology partners to ensure business processes were understood at all levels.
- Manage client's third-party wealth management platform integration to mitigate negative customer impacts.

**Conserte Consulting | May 2014 – May 2020**  
**Management Consultant** – Charlotte, NC  
**Wealth Management Operational Transition**

- Provided full life cycle subject matter expertise (SME) to develop a new insourcing team for the new service leader.
- Partnered with service leader to design model and roadmap to service offering allowing team's expectation autonomy.

**ProductHQ | June 2018 – August 2021**  
**Co-Owner/Product Manager** – Charlotte, NC

- Conducted market research on product managers' needs, and competitive analysis on other products to determine gaps and areas of opportunities.
- Developed features through user story development, and participated in backlog grooming and sprint planning review to ensure customer content was aligned.
- Conducted financial reviews to determine budget spend/burn rate and leveraged user feedback to improve user adoption and revenue generation.

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### CAREER MILESTONES

- Assisted with the planning and execution of a program that provided approximately \$1.8B of assets inflow for a client's education savings product. – **CA Educational Savings Scholarship Program Launch**
- Resurrected a poorly executed trust platform conversion which resulted in a new trust platform with minimal customer and operational impact. – **Trust Platform Conversion**
- Incorporated strategic planning and process redesign which resulted in a new twelve-person team that managed approximately \$2B in AUM/thousands of transactions. – **Wealth Management Operational Transition**
- Provided management and support to Product Owner for IRA transformation to enhance product offerings which produced initial inflows of \$7MM in its first month through organic growth. – **IRA New Product Launch**
- Developed a new product roadmap that aligned with user expectations, and established standard work and process controls. – **Wealth Management Process and System Evaluation**
- Champion the creation of a scorecard to complete vendor analysis. – **Customer Relationship and Field Service Management System Selection for Mid-Market Client**

### PROFESSIONAL EXPERIENCE CONTINUED...

#### **North Highland | November 2010 – May 2013**

##### **Management Consultant** – Charlotte, NC

- Ensured continuous delivery of quality products and services to retail, international wholesale, and home mortgage clients.
- Delivered strategic planning, process improvement/analysis solutions, and managed initiatives for successful and timely completion.

#### **NouvEON Technology Partners, Inc. | October 2009 – October 2010**

##### **Management Consultant** – Charlotte, NC

- Designed a fulfillment process to assist 100,000+ HAMP ineligible borrowers through other loss mitigation options.
- Provided Subject Matter Expertise guidance to workflow automation implementation to ensure HAMP compliance.
- Utilized MSP to complete process analysis and design for the HAMP program.

#### **CACI International | February 2009 – October 2009**

##### **Consultant/Lead Process Expert** – Norfolk, VA

- Coordinated production issue resolution for four public shipyard supply chain and financial systems, which included determining release content by prioritizing and addressing the client's production concerns.
- Provided Subject Matter Expertise knowledge to support the client's Defense Base Closure and Realignment (BRAC) project for their supply chain.

### BUSINESS COMPETENCIES

#### **Product Management & Development**

- Worked alongside Fortune 100 financial service providers to deliver quality process improvements and ensure quality products and services.
- Leveraged relationships with Fortune 100 financial service providers, ensuring continuous delivery of quality products/services to retail retirement, international wholesale, and home mortgage clients.
- Strategically managed initiatives for the client's Retail Investment Product Group (RIPG), adhering to the commitment to deliver top-quality products and services.
- Researched competitors in the industry to foster impactful business relationships with clients and business partners.

#### **Program Management**

- Performed full processing life cycle from designing to testing integrated systems, while effectively managing production processes.
- Mitigated human work factors, ensuring quality and inventory control to protect the integrity of the operational costs.

#### **Business Process Expert**

- Provided cradle-to-grave business process mapping allowing clients to make immediate strategic decisions from an operational and customer contact strategy perspective.