ROBERT GOLDBERG

ENTERPRISE DATA & AI PORTFOLIO STRATEGY | INVESTMENT GOVERNANCE | BUSINESS VALUE REALIZATION

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EXECUTIVE PROFILE

Enterprise strategy and portfolio executive helping complex organizations translate business priorities into disciplined investment decisions, scalable operating capabilities, and measurable outcomes. Former Head of Product Management and Chief of Staff to the CPO at Broadridge, where he helped lead portfolio governance and investment prioritization across a $4B business encompassing more than 200 products and approximately $230M in engineering investment. Combines enterprise portfolio management, financial discipline, AI-enabled analytics, and organizational transformation to improve how organizations evaluate opportunities, allocate resources, manage execution risk, and realize business value. Experienced in building governance frameworks and executive decision systems across complex, regulated environments.

CORE EXPERTISE

Enterprise Portfolio Strategy • Data & AI Investment Governance • Investment Prioritization & Capital Allocation • Portfolio Value Realization • AI Transformation & Workflow Automation • Portfolio Analytics & Executive Decision Support • Strategic Planning & Investment Sequencing • Cross-Functional Governance • Organizational Readiness & Change Management

PROFESSIONAL EXPERIENCE

DATA CONSULT SOLUTIONS | Wilton, CT | Nonprofit Strategy & Impact Advisor | 2022–Present

www.yournfpdata.com

- Advise nonprofit organizations on program strategy, organizational performance, analytics, partnerships, and impact measurement to translate priorities into measurable outcomes.
- Separate nonprofit executive appointment: Interim Managing Director, Products That Count (July–October 2026). Led strategic repositioning, enterprise partnership development, program positioning, and growth planning for a large product-professional community.
- Developed an AI Product Organization Assessment linking organizational capabilities and AI adoption to decision quality, operating effectiveness, and performance outcomes.

BROADRIDGE FINANCIAL SOLUTIONS | New York, NY | Jan 2019–2026

Strategic Advisor (Consultant) | Jul 2026

- Retained after organizational restructuring to advise on client success, competitive and market intelligence, and strategic initiatives.

Vice President, Portfolio Strategy & Intelligence | May 2025–Jun 2026

- Directed portfolio strategy, investment governance, and market intelligence across a $4B global financial technology business encompassing more than 200 products.
- Built an integrated portfolio decision framework combining financial, customer, product, operational, and competitive intelligence to evaluate investment opportunities, inform prioritization, and support executive capital allocation decisions.
- Strengthened investment discipline and helped redirect approximately $30M from sustaining activities toward strategic product development and growth opportunities.
- Established portfolio governance and performance reporting processes connecting strategic priorities, investment decisions, execution capacity, and measurable business outcomes.
- Introduced AI-enabled analytics and automated executive reporting workflows to accelerate insight generation, improve reporting consistency, and support more timely investment decisions.

Vice President, Head of Product Management & Chief of Staff to the CPO | Jan 2019–May 2025

- Partnered with the Chief Product Officer to lead strategy, investment planning, and organizational performance for a global product organization supporting approximately $4B in revenue, 125 product professionals, and 2,000 engineers.
- Built portfolio governance connecting business strategy, product roadmaps, investment priorities, engineering capacity, and performance outcomes across approximately $230M in engineering investment.
- Established executive portfolio reviews, quarterly business reviews, investment councils, and performance frameworks to strengthen prioritization, resource allocation, and accountability.
- Founded Product Data Science & Analytics, integrating product adoption, engineering, customer, operational, and financial data into investment decisions and executive performance reporting.
- Led cross-functional alignment across Product, Technology, Finance, Sales, and Operations to improve investment transparency, execution discipline, and business outcomes.

CAMBRIDGE COLLEGE | Koch Chair of Management, MBA Executive Director & Interim Dean | Jun 2016–Dec 2018

- Led graduate business program strategy, operations, academic portfolio, faculty, financial management, and market positioning.
- Repositioned programs around workforce demand, developed offerings and partnerships, and improved enrollment performance through stronger analytics and planning.

MIDIOR CONSULTING | Partner, Strategy, Innovation & Product Development | Jun 2014–Jun 2016

- Advised enterprise clients on growth, customer discovery, portfolio decisions, product development, commercialization, and change; held business development and delivery accountability.

STAGES OF INNOVATION | Founder & Managing Partner | Nov 2009–Jun 2014

- Founded and built a product innovation consultancy, later acquired by MIDIOR; led market assessment, product validation, competitive intelligence, and commercialization engagements.

PITNEY BOWES | Vice President, Product Strategy, Innovation & New Growth | Sep 2001–Nov 2009

- Held successive leadership roles in product strategy, innovation, new business development, and financial-services commercialization.
- Led development and launch of transaction-based financial and digital commerce offerings, building recurring revenue opportunities and cross-functional partnerships.
- Contributed to patented innovations in secure parcel delivery and electronic billing.

EDUCATION & EXECUTIVE DEVELOPMENT

MBA, Corporate Finance & Investment Strategy — Adelphi University | BS, Business Administration & Management — Plattsburgh State University

Business Analytics: Decision-Making with Data — Kellogg School of Management | Business Strategy — Harvard Business School

PROFESSIONAL APPOINTMENT

FINRA Arbitrator | Aug 2025–Present