

Matt Valkovic

Army vet & fintech exec

San Francisco Bay Area

Email: matthewvalkovic@gmail.com

LinkedIn: <https://www.linkedin.com/in/matthewvalkovic/>

Experience

CircleBlack, Inc. / Head of Customer Success

November 2014 - April 2024, Remote and Boston, MA

SaaS wealth management platform for registered investment advisors with over \$100B in assets; portfolio company of Long Arc Capital.

Built and led Customer Success organization. Employee #4. Promoted to executive leadership team after company acquisition and restructure.

Led engagement, product delivery, and marketing for flagship enterprise client, RBC Capital Markets, growing ARR from \$600k to over \$1M and increasing user base annually by nearly 20% over 4-year span.

Implemented customer research & product marketing initiatives to drive new product development and revamped go-to-market strategies for independent RIA channel, leading to NPS over 40 and 70% increase in new sales over 2-year span.

Spirit of America / Field Operations Program Manager

June 2010 - April 2014, Los Angeles, CA & Worldwide

Congressionally-recognized nonprofit organization that delivers privately funded humanitarian, economic, and security assistance in response to needs identified by deployed US troops and diplomats.

Hired as organization's first field operations representative. Launched inaugural embedded field operations program in Helmand Province, Afghanistan alongside US Marines. Promoted to program's manager; recruited and hired team of 4 field ops personnel.

Researched, designed, and implemented DoD and Theater Command policies and agreements for NGO-military collaboration in conflict zones.

Expanded program delivery with US troops and diplomats serving in the Middle East, Africa, and South America. Partnership formally recognized by Congress and the Department of Defense.

United States Army / Field Artillery Lieutenant-Captain

January 2006 - January 2010, Fort Riley, KS & Baghdad, Iraq

Led \$13M civil-military operations program and unit's reporting and assessment analysis for 800-soldier battalion during yearlong combat deployment to Baghdad, Iraq in 2008-09. Among the highest rated junior officers in the battalion. Awarded Bronze Star Service Medal.

Education

Penn State University / BAs in International Politics & History

August 2002 - December 2005, University Park, PA

Focus in US foreign & national security policy. Columnist for The Daily Collegian and Centre Daily Times Blue. Study abroad in Barcelona, Spain.