

# CURRICULUM VITAE



## Barbara Close

Verified Expert in Management Consulting

Management Consulting Expert

Princeton, NJ, United States

Total member since August 4, 2022

### EXPERTISE

Excel Market Sizing Due Diligence Growth Strategy Business Modeling Pricing Analysis Pitch Deck Consulting  
M&A Valuations Financial Modeling Budgeting Consulting Investment Thesis Consulting Logistics Consulting  
CFO Consultant Small Business Operations

## Bio:

As a former KPMG and PwC consultant and Fortune 1000 executive, Barbara has collaborated with CXOs to solve operational challenges in diverse industries for 20+ years. She has expertise across consumer and industrial products and services, manufacturing, logistics, eCommerce, retail, and technology, where she uses her engineer's mindset to drive business value, minimize costs and risk, and optimize processes. Barbara is a mechanical engineer and Kellogg MBA.

## Career Highlights

### Principal Consultant

StrategyScape

### Strategy & Operations Consultant (via StrategyScape)

Nike

### Global Director Mergers & Acquisitions

Tyco

## Education Highlights

### Master's Degree

Kellogg School of Management at Northwestern University

### Bachelor's Degree

University of Washington

## Work Experience

# CURRICULUM VITAE

## **CC INVEST | Crypto Advisor**

### • 2020 – PRESENT

Dedicated on trading platform, using technical and fundamental instruments, to bring the best possible performance for our traders.

• Managing portfolios over \$1.8M on financial markets for European Investors.

Managing portfolios over \$1.4M on financial markets for British Investors.

• Personal dedication and advices on supporting the growth of our Investors funds, using financial plan over time and risk management.

## **Principal Consultant**

### 2008 - PRESENT

#### StrategyScape

- Led commercial due diligence projects identifying critical value drivers and competitive challenges for private equity and corporate acquisitions, ranging from \$5 million to \$500 million in value in diverse industries.
- Modeled financials and mapped operations to validate growth and value. Defined markets, competitors, and demand trends to expose opportunities and white space.
- Informed and facilitated shareholder and management decision-making by benchmarking workflows and costs, optimizing prices, and recommending process efficiencies based on industry best practices.
- Developed long-term contractual relationships with multiple global consultancies to provide fractional expertise on strategy and due diligence engagements as part of their consulting teams.
- Executed primary and secondary market research and interview programs to understand customer needs, industry trends, and market intelligence.
- Modeled strategic growth opportunities by creating spreadsheet models of existing or contemplated business operations and developing multiple future scenarios to determine potential value and critical risks.
- Uncovered operational issues, including excess or hidden costs, sliding revenue from underperforming products, ineffective marketing tactics, product or service defects, process bottlenecks, and customer experience weaknesses.
- Worked as an expert in the equestrian industry, based on 20+ years as a professional sport horse trainer and licensed official, and 35+ years in riding, training, and managing horses, including veterinary and nutritional decisions.

# CURRICULUM VITAE

- Developed the internal budget and forecasting for the launch of a new R&D organization within a \$35 billion multinational, including complex financial/headcount resource modeling in Excel, VBA dashboards, and forecasting tools.
- Mapped all processes for a market-leading career services firm, leading to identification of waste and defects undercutting financial performance and opportunities for technological transformation.

Focus areas: Mergers & Acquisitions (M&A), Growth, Operations, Manufacturing, Excel Expert, Supply Chain, Quality Control (QC), Market Fit, Research, Fundraising, Cross-border M&A, Financial Services, Banking & Finance, Strategy, Brand Marketing, Finance, Modeling, DCF Valuation, StatsModels, Mechanical Engineering, DCF Modeling, Discounted Cash Flow (DCF), Forecasting, Forex Analysis, Target Operating Models, Operating Models, Go-to-market Strategy, Business Process Modeling, Business Model Canvas, Business Modeling, Business Models, Financial Modeling, Business Strategy, M&A Strategy, Competitive Analysis, Pricing, Revenue & Expense Projections, United States, Market Research, Performance Improvement, Process Mapping, Logistics, Supply Chain Optimization, Key Performance Indicators (KPIs), Go-to-market Plans, Sales Strategy, Pricing Models, Market Trends, Regulated Industries, Regulatory Affairs, M&A (Buy-side), Microsoft Excel, Request for Proposal (RFP), Procurement, Strategic Planning, Profit & Loss (P&L), Growth Strategy, Management Consulting, Order to Cash (O2C), Business Transformation, Retail & Wholesale, Digital Strategy, Retail Strategy, Financials, Budgeting, Process Flows, Organizational Strategy & Design, Organizational Design, Investment Thesis, Pitch Deck Consultant, Roadmaps, Process Improvement, Marketing Strategy

## **Advisory Director**

2022 - 2023

KPMG

- Delivered a 7-figure strategy transformation project for a \$8 billion global leader in food ingredients. Enabled executive leadership team and 100+ international business and functional managers to make decisions affecting global market strategy.
- Quantified cost savings and cash flow improvements for a \$100 million PE-owned document printer. Leveraged rapid diagnostic approach to identify EBITDA improvements of \$14 million relative to a \$2 million target achievable within one year.
- Led O2C/P2P turnaround effort for a \$1.5 billion global cosmetic/beauty chemical producer in crisis. Mapped key functions upstream and downstream from A/P activities. Diagnosed critical process weaknesses and developed remediation plans.

Focus areas: Business Models, Operating Models, Process Mapping, Manufacturing, M&A Strategy, Strategy, Performance Analysis, Supply Chain, Go-to-market Plans, Sales Strategy,

# CURRICULUM VITAE

Pricing Models, Market Trends, Regulated Industries, Regulatory Affairs, M&A (Buy-side), Microsoft Excel, Business Strategy, Request for Proposal (RFP), Procurement, Strategic Planning, Profit & Loss (P&L), Growth Strategy, Financial Modeling, Go-to-market Strategy, Market Research, Management Consulting, Order to Cash (O2C), Business Transformation, Retail & Wholesale, Digital Strategy, Retail Strategy, Operations, Financials, Budgeting, Process Flows, Organizational Strategy & Design, Organizational Design, Investment Thesis, Pitch Deck Consultant, Roadmaps, Process Improvement, Marketing Strategy

## **Operational Excellence Consultant**

2013 - 2019

Versa Products Company

- Reduced defects and customer complaints by 30% annually for four years by uncovering root causes and redesigning manufacturing processes. Turnaround time for complaints shrank from months to hours, and shop morale improved.
- Led internal, cross-functional initiative targeting growth, resulting in 90+ strategic growth opportunities presented to the leadership team. Led development of 5-year growth plan, priority roadmap, and team structure required to execute.
- Led digital marketing function. Built content playbook and oversaw all transformation actions, including website overhaul and Magento eCommerce implementation, which added 20% in direct sales to the legacy distributor channel.
- Overhauled quality operations. Supervised all inspection activities, inspectors, industrial engineers, and Lean projects. Implemented sustained efficiencies; led, including ISO audits and upgrades.

Focus areas: Lean Manufacturing, Quality Control (QC), Production, Process Design, Operations, Strategy, Brand Marketing, Finance, Modeling, StatsModels, Mechanical Engineering, Growth, Manufacturing, Excel Expert, Supply Chain, Market Fit, Research, Forecasting, Target Operating Models, Operating Models, Go-to-market Strategy, Business Process Modeling, Business Model Canvas, Business Modeling, Business Models, Financial Modeling, Business Strategy, M&A Strategy, Competitive Analysis, Pricing, Revenue & Expense Projections, United States, Market Research, Performance Improvement, Process Mapping, Logistics, Supply Chain Optimization, Key Performance Indicators (KPIs), Go-to-market Plans, Sales Strategy, Pricing Models, Market Trends, Regulated Industries, Regulatory Affairs, M&A (Buy-side), Microsoft Excel, Request for Proposal (RFP), Procurement, Strategic Planning, Profit & Loss (P&L), Growth Strategy, Management Consulting, Order to Cash (O2C), Business Transformation, Retail & Wholesale, Digital Strategy, Retail Strategy, Financials, Budgeting, Process Flows, Organizational Strategy & Design, Organizational Design, Investment Thesis, Pitch Deck Consultant, Roadmaps, Process Improvement, Marketing Strategy

# CURRICULUM VITAE

## **Strategy & Operations Consultant (via StrategyScape)**

2008 - 2015

Nike

- Increased customer order accuracy and on-time delivery to 100% while reducing labor requirements for the recycled footwear distribution business. Developed processes and standards for product recycling, packaging, and distribution.
- Improving the quality of recycled materials by developing and implementing SOPs across factory operations in the US, EU, and Asia. Doubled yield and enabled ISO standard validation and standardized reporting dashboards across all partner sites.
- Developed a monthly reporting system, measurement method, and website counter to promote the success of the used shoe collection program, which was used in corporate promotions and global sustainability reports.
- Facilitated seamless transition-team onboarding to support a corporate reorganization by developing an operational playbook and team training documentation.

Focus areas: Operations, New Products, Quality Control (QC), Sustainable Development, Sustainable Advisory, Strategy, Brand Marketing, Finance, Modeling, DCF Valuation, Mechanical Engineering, Mergers & Acquisitions (M&A), Growth, Manufacturing, Excel Expert, Supply Chain, Market Fit, Research, DCF Modeling, Discounted Cash Flow (DCF), Forecasting, Forex Analysis, Target Operating Models, Operating Models, Go-to-market Strategy, Business Process Modeling, Business Model Canvas, Business Modeling, Business Models, Financial Modeling, Business Strategy, M&A Strategy, Competitive Analysis, Pricing, Revenue & Expense Projections, United States, Market Research, Performance Improvement, Process Mapping, Logistics, Supply Chain Optimization, Key Performance Indicators (KPIs), Go-to-market Plans, Sales Strategy, Pricing Models, Market Trends, Regulatory Affairs, M&A (Buy-side), Microsoft Excel, Request for Proposal (RFP), Procurement, Strategic Planning, Profit & Loss (P&L), Growth Strategy, Management Consulting, Business Transformation, Retail & Wholesale, Digital Strategy, Retail Strategy, Financials, Budgeting, Process Flows, Organizational Strategy & Design, Organizational Design, Investment Thesis, Pitch Deck Consultant, Roadmaps, Process Improvement, Marketing Strategy

## **Founder and Head Trainer**

1987 - 2011

Hunt Field Farm Equestrian

- Founded and operated an equestrian services business focused on horse and rider training, equestrian facilities management, client services, competitions, and horse brokerage.

# CURRICULUM VITAE

- Managed stables, including labor and professionals. Oversaw the care and safety of 20-40 horses and riders.
- Designed and managed feed and veterinary programs for equines used for competition, including overseeing veterinary care, farriers, and other therapists (massage, equine dentists, chiropractors, and acupuncturists).
- Trained riders and horses for competition and competed as a professional rider on top-level US "A" show circuits.
- Judged competitions across the US as an official judge licensed by the US Equestrian Federation.

Focus areas: Coaching, Training, Sports Business, Sports & Athletics, Facilitation, Facilities Management, Event Management, Profit & Loss (P&L), Organizational Strategy & Design, Organizational Design

## **Global Director Mergers & Acquisitions**

2007 - 2007

Tyco

- Built the functional capabilities required to pursue M&A, including target search and screening, internal due diligence, proforma financial modeling, and management negotiations (supporting eight business units).
- Cultivated 10+ attractive acquisition candidates (within six months) valued from \$6 to \$200 million in safety and security technologies, access control, personal protective equipment, and fire detection.
- Promoted the targeted M&A transactions to the C-suite by guiding business unit executives through negotiations, internal deal reviews, strategy, and transaction execution.
- Standardized financial and valuation models and pitch decks across business units, leading to consistent assessment metrics and more efficient deal reveals with the executive team.

Focus areas: Mergers & Acquisitions (M&A), Corporate Strategy, Due Diligence, Operational Risk, Growth Strategy, Cross-border M&A, Banking & Finance, Strategy, Finance, Modeling, DCF Valuation, StatsModels, Mechanical Engineering, Growth, Manufacturing, Operations, Excel Expert, Supply Chain, Market Fit, Research, DCF Modeling, Discounted Cash Flow (DCF), Forecasting, Forex Analysis, Target Operating Models, Operating Models, Go-to-market Strategy, Business Model Canvas, Business Modeling, Business Models, Financial Modeling, Business Strategy, M&A Strategy, Competitive Analysis, Pricing, Revenue & Expense

# CURRICULUM VITAE

Projections, United States, Market Research, Performance Improvement, Process Mapping, Logistics, Supply Chain Optimization, Key Performance Indicators (KPIs), Market Trends, Regulated Industries, Regulatory Affairs, M&A (Buy-side), Microsoft Excel, Request for Proposal (RFP), Procurement, Strategic Planning, Profit & Loss (P&L), Management Consulting, Business Transformation, Retail & Wholesale, Digital Strategy, Retail Strategy, Financials, Budgeting, Process Flows, Organizational Strategy & Design, Organizational Design, Investment Thesis, Pitch Deck Consultant, Roadmaps, Process Improvement, Marketing Strategy

## **Director, Transaction Services and Strategy**

2006 - 2007

PwC

- Headed commercial due diligence teams for targets valued at \$50 million to \$1+ billion for PE and corporate clients in retail, industrial, aerospace, CPG, hospitality, business services, IT, and telecom. Project values ranged from \$100,000-\$600,000.
- Created a training program for partners and directors covering new practice capabilities in due diligence and growth strategy; presented it to hundreds of colleagues during an annual global management meeting.
- Led teams of 5-8 junior associates and managers to deliver the highest-quality results under demanding timelines, including Excel analyses, PowerPoint reports, and qualitative summaries.

Focus areas: Mergers & Acquisitions (M&A), Due Diligence, Due Diligence Consultant, Manufacturing, Consumer Services, Retail & Wholesale, Comparable Company Analysis, Market Sizing, Competitive Analysis, Growth, Cross-border M&A, Financial Services, Banking & Finance, Strategy, Finance, Modeling, DCF Valuation, StatsModels, Mechanical Engineering, Operations, Excel Expert, Market Fit, Research, DCF Modeling, Forecasting, Forex Analysis, Target Operating Models, Operating Models, Go-to-market Strategy, Business Model Canvas, Business Modeling, Business Models, Financial Modeling, Business Strategy, M&A Strategy, Pricing, Revenue & Expense Projections, United States, Market Research, Performance Improvement, Process Mapping, Logistics, Supply Chain Optimization, Key Performance Indicators (KPIs), Sales Strategy, Market Trends, Regulated Industries, Regulatory Affairs, M&A (Buy-side), Microsoft Excel, Request for Proposal (RFP), Procurement, Strategic Planning, Profit & Loss (P&L), Growth Strategy, Management Consulting, Business Transformation, Digital Strategy, Retail Strategy, Financials, Budgeting, Process Flows, Organizational Strategy & Design, Organizational Design, Investment Thesis, Pitch Deck Consultant, Roadmaps, Process Improvement, Marketing Strategy

## **Education**

1997 - 1999

# CURRICULUM VITAE

## **Master's Degree in Business Administration (MBA)**

Kellogg School of Management at Northwestern University - Evanston, IL, USA

1983 - 1986

## **Bachelor's Degree in Mechanical Engineering**

University of Washington - Seattle, WA, USA

## **Skills**

### **Finance**

Mergers & Acquisitions (M&A), Forecasting, Comparable Company Analysis, Due Diligence, Cross-border M&A, Financial Modeling, Market Research, Pricing, Revenue & Expense Projections, M&A (Buy-side), Profit & Loss (P&L), Budgeting, Investment Thesis, DCF Valuation, Discounted Cash Flow (DCF), Cost of Capital, Order to Cash (O2C), Depreciation, Fundraising

### **Output Software**

Microsoft Excel

### **Industry Expertise**

Retail & Wholesale, Logistics, Financial Services, Banking & Finance

### **Geographic Expertise**

United States, Canada

### **Other**

Microsoft Office, Strategy, Analysis, Growth, Operations, Manufacturing, Excel Expert, Supply Chain, Quality Control (QC), Market Fit, Research, DCF Modeling, New Product Rollout, New Product Business Cases, Product Growth, Market Sizing, Market Studies, Survey Design, Consumer Trends, Use Cases, Customer Segmentation, Demand Sizing & Segmentation, Process Design, New Products, Operational Risk, Due Diligence Consultant, Consumer Services, Competitive Analysis, Financials, Growth Strategy, M&A Strategy, Business Strategy, Business Models, Business Modeling, Business Model Canvas, Business Process Modeling, Go-to-market Strategy, Operating Models, Target Operating Models, Startups, Early-stage Funding, Launch Strategy, Idea Validation, Performance Improvement, Process Mapping, Key Performance Indicators (KPIs), Go-to-market Plans, Sales Strategy, Pricing Models, Market Trends, Request for Proposal (RFP), Procurement, Strategic Planning, Management Consulting, Business Transformation, Digital Strategy, Retail Strategy, Process Flows, Pitch Deck Consultant, Roadmaps, Process Improvement, Marketing Strategy, Windows, Brand Marketing, Finance, Modeling, Qualtrics, Demographic Data, Lean Manufacturing, Production, Sustainable

# CURRICULUM VITAE

Development, Early-stage Venture Capital, Supply Chain Optimization, Regulated Industries, Regulatory Affairs, Organizational Design, StatsModels, CAD, Mechanical Engineering, Software Design, Drafting, System Design, Forex Analysis, Staffing, Market Research & Analysis, Sustainable Advisory, Corporate Strategy, Performance Analysis, Coaching, Training, Sports Business, Sports & Athletics, Facilitation, Facilities Management, Event Management, Organizational Strategy & Design