

ROBERT WILSON

BUSINESS DEVELOPMENT EXECUTIVE | AI TRANSFORMATION AND M&A

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[linkedin.com/in/therobertwilson](https://www.linkedin.com/in/therobertwilson) | [Career portfolio](#)

Commercial and operating leader with experience in strategic partnerships, vendor negotiations, national sales enablement and seller-side M&A execution. Builds teams and practical systems that connect business strategy with financial and operating performance. Recent work includes AI-assisted healthcare reporting, financial analysis and transaction materials supporting completed business sales.

Leadership and expertise

Growth strategy • Marketing and brand leadership • Business development • AI workflow implementation • P&L analysis and forecasting • M&A due diligence • Sales enablement • Team and vendor leadership

Professional experience

INDEPENDENT CONSULTING | Jan 2026-Present

AI Transformation, Growth and M&A Advisory

- Reduced completion time for a healthcare reporting workflow from approximately 60 hours to 2 hours by designing and implementing AI-assisted automation.
- Built AI-assisted healthcare reporting and revenue-cycle workflows for accounts receivable, unbilled claims, case summaries and financial reconciliation, with source tracking and human review.
- Supported seller-side due diligence and closing for a completed \$60M industrial hydraulics transaction; prepared financial analyses, diligence responses and closing documentation.
- Created confidential information memoranda (CIMs) and transaction materials across healthcare, industrial and commercial services; contributed to four completed business sales.
- Analyzed P&L statements, balance sheets, trailing-12-month performance, EBITDA, working capital and forecasts to support buyer diligence and management decisions.
- Advised services businesses on growth and operating execution, including campaigns, customer segmentation, websites, cash-flow planning and invoice reporting.

FIVE STAR INSTITUTE | 2023-Jan 2026

Vice President of Marketing and Experience

- Led marketing and experience across publishing, conferences, education and membership brands, including MortgagePoint and the Alliance of M&A Advisors (AM&AA).
- Helped launch and grow MortgagePoint to more than 400,000 annual visitors; developed podcast and interview programming alongside publishing and digital campaigns.
- Managed Google and Facebook advertising, campaign spend, social channels, content calendars, brand messaging and performance reporting across multiple brands.
- Directed conference promotion and experience strategy, aligning editorial, sales, sponsors and event teams around audience engagement and commercial priorities.

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INTRACARE | 2022-2023

Vice President of Marketing and Experience

- Helped unify three healthcare organizations under one brand, establishing positioning, messaging, brand standards, a new website and supporting marketing infrastructure.
- Aligned clinical, operational and leadership communications to support patient engagement, organizational integration and growth.

DIVINC | 2021-2022

Vice President of Marketing

- Directed marketing for an entrepreneurship accelerator; implemented HubSpot, strengthened funnels and supported donor, sponsor and founder engagement.
- Worked with enterprise partners including JPMorgan and Verizon on strategic relationships and program engagement.

ONDOC | 2018-2021

Co Founder and Chief Executive Officer

- Built a healthcare-services business spanning company strategy, brand identity, service offerings, budgets, executive hiring, vendor negotiations and board reporting.
- Developed partnerships involving Teladoc, CVS and Kroger; connected service pricing, vendor economics and associate compensation to the commercial model.
- Created launch campaigns, website content, sales presentations, field-training programs and live events to take the brand to market.

STREAM ENERGY | 2010-2018

Senior Director and Progressive Leadership Roles in Field Sales, Development and Training

- Led field development, national training, associate support and sales operations for a network exceeding 300,000 independent associates; managed approximately 60 staff at peak, including 12 direct reports.
- Oversaw more than \$4M in operating budgets and over \$60M in associate commissions, including planning, forecasting, vendor coordination and payout operations.
- Increased customer count 35% over two years to more than 151,000; reduced average cost per customer 43% and improved associate efficiency more than 88%.
- Developed Golden Tickets, a customer-acquisition incentive program generating \$3M in year-over-year growth; helped develop compensation programs for the national field.
- Led Stream University and Ignite Academy training, major live events, executive speaking and production; managed outsourced support operations in Mexico and the Philippines.

NUTRISYSTEM | 2007-2010

Sales Supervisor

- Led and coached 40 inbound and outbound sales representatives; exceeded performance objectives by up to 8.5%.

Education

Temple University | Bachelor of Business Administration