

Hello *Data Analytics* group or *Finance/Accounting* dept.,

I would appreciate your consideration for a *Data Analyst* or *Staff Accountant* position at your company.

I help my employer utilize its data and manage its money, in the most efficient manner possible:

- I love the profession I have chosen; and I would like to help your analytics team to address its data analysis and financial recordkeeping challenges.
- To expand my capabilities, I have completed fifteen courses since attaining my BS degree in Finance.
- In various capacities, I have used at least a dozen ERP systems and G/L accounting programs.

Beyond financial accounting, I have a passion for managerial (cost) accounting and data analysis. In other words, I am looking to analyze vital business data rather than process recurring accounting transactions.

- To facilitate this “pivot,” I am enrolled in online training courses. Please click over to [Microsoft Professional Program in Data Science](#) and [Microsoft Excel for the Data Analyst](#) for a partial description of the coursework.
- During college, I learned two programming languages, while today I create *Excel* macros using *VBA* scripts. I have rudimentary knowledge of *MS Access* and was exposed to two other database programs. Early on, I learned that *SQL* was a powerful tool for data management. I was fascinated right then, but only recently did I have the opportunity to learn more.
- Expanding my skills into data analytics seems like a logical career progression. I am enjoying the subject matter and am excited about what I can do with these new skills.

I may be qualified to help your team in several capacities, such as:

- Inventory management and cost accounting
- Financial forecasting and trend analysis
- Commissions analysis and processing payroll
- Cash balance optimization and bank account recons
- Website analytics and social media utilization statistics
- Some projects or special tasks that I’m unaware of

I have been a liaison in three positions, interfacing between Accounting-Finance and the Legal, IT, or Marketing team. While I am primarily looking to “analyze data,” I could help your finance-accounting-bookkeeping team as well, given how that is a big part of my past experience.

Additional information can be downloaded from my [Dropbox](#) and [GitHub](#) accounts; including:

- Excel and PowerPoint work samples
- A résumé that is ATS-compliant (chronological, simple formatting, typical section headings)
- Course certificates and commendation letters

Thank you for your time and interest.

Sincerely,
Allan M. French
Mountain View, CA 94040



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DATA ANALYST • STAFF ACCOUNTANT

▣ Numbers Crunched • Beans Counted • Data Wrangled ▣

With a passion for analyzing data and developing software solutions, I am pivoting from *financial accounting and corporate finance* into *data analytics and managerial (cost) accounting*.

SOFTWARE KNOWLEDGE

Data Analysis, Cash Management, Payroll

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| Excel (<i>incl. pivot tables, VBA macros, lookups; 10+ yrs</i>) Allocadia cloud-based budgeting software Dun & Bradstreet “CreditWatch” (<i>hardcopy format</i>) Bloomberg terminals (<i>for financial research; 5 years</i>) Preliminary exposure to SQL, Python, Azure, and Jupyter (<i>details in Education block</i>) | ADP Pay eXpert (“Payex”) NovaTime online timecard system Paychex (<i>2 years</i>) MS Access and 2 legacy database programs (<i>limited</i>) |
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Corporate ERP / Small Business Accounting

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| Sage MIP Fund Accounting (<i>2½ years</i>) Sage MAS-90 (<i>a.k.a. “Sage 100 ERP,” for 6 years</i>) Microsoft Dynamics GP (<i>recent training</i>) Plus six others (<i>legacy applications and proprietary software</i>) | Oracle Financials (<i>Procurement module</i>) SAP (<i>Accounts Payable module</i>) QuickBooks (<i>both Pro and Enterprise editions</i>) |
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Additional Tools

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| GitHub, Dropbox, SharePoint, FTP, Box, and Slack Adobe Acrobat (<i>customized templates and forms</i>) PowerPoint, Word, Publisher, Windows, and Outlook | Two legacy computer programming languages Basic HTML website coding skills Lacerte and CCH TaxWise professional tax software |
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ACHIEVEMENTS & DUTIES

Data Analysis and Visualization Projects

- Transitioned a marketing team from an Excel-based budgeting tool, to a *cloud-based “MRM” solution*.
- *Extracted customer records* from QuickBooks Pro, *cleaned-up the dataset*, and prepared it for catalog mailing campaign; client later reported that non-deliverable mailings were down substantially.
- Designed an Excel-based *CRM tool for contact management*.
- Developed and presented a *PowerPoint slideshow* on personal income tax preparation, for job seekers at a networking event; and created a slideshow to screen for coworkers, as part of an office celebration.
- Created a *macro-driven “client services database”* in Excel, for a local nonprofit organization.

Leadership and Communications:

- Served as a *liaison between Accounting and other departments*, twice officially and once unofficially; *trained or mentored* colleagues on at least four occasions.
- Invited to serve (pro-bono) on the *board of directors* of two nonprofit organizations, and served one of them.
- *Discovered and reported a software error* in the Profile Summary section of the LinkedIn website. It caused incorrect information to be saved into some members’ profiles. (Has been corrected; request YouTube video URL, to see error for yourself!)
- Charter member of “Money Talks” chapter of Toastmasters *public speaking club*, 1995-1996.
- Written *over 105 monthly newspaper columns*, published by the largest nonprofit organization of its kind (with circulation of around 3,000); expository writing samples available upon request.

Fixed Assets, Inventory, and Expenses:

- Within consolidated invoices, allocated expenses among *21 business units*.
- Capitalized fixed assets; integrated add-on *fixed asset management* module into QuickBooks Enterprise system, and taught colleagues how to use it.
- Audited and reconciled *raw materials inventory* (billed-vs-actual), for a medical devices manufacturer.
- Categorized historical fixed asset data, for *depreciation expense* calculations.

Cash, Investments, and Payroll:

- Calculated *mutual fund share prices*, created *pro-forma financials*, and provided fund *performance statistics* to ratings agencies and the SEC, during 6 years with an investment management company.
- Prepared *bank recs for 20 real estate properties*, involving 85 cash accounts among 3 banks, for 2½ years.
- Onboarded the *new hires* and managed the *payroll of 70 employees* in two states, for a business services firm; also developed an *HRIS recordkeeping system* for them.
- Created solution to ascertain *cash burn rates* and forecast *cash reserves*, to minimize under-invested funds.

Financial Statements and Taxes:

- Analyzed *financial statements* and gauged potential *credit risk* of large general contractors.
- Filed *sales/use tax returns* and prepared *571-L business property statements*, for clients of small CPA firm.
- Prepared *personal income tax returns* for elderly and low-income individuals, as a pro-bono service.

EDUCATION & RECOGNITION

Education and Certification:

- Have taken 15 additional course since attaining BS degree; these encompass both academic and software topics; they include 4 Master degree courses at University of Phoenix and Golden Gate University.
 - ▶ Recent and ongoing training on data analytics and managerial (cost) accounting, via EdX and Coursera online learning platforms. Relevant software tools include *Python*, *SQL*, *Azure Machine Learning Studio*, and *Jupyter Notebook*, as well as *Microsoft Power BI* and advanced *Excel* topics. (Cover letter has weblinks to further details.)
 - ▶ Was exposed to two legacy database programs in the past, plus *Microsoft Access* more recently. Self-trained on *MS Dynamics GP* several years ago, using college-supplied course materials; exposure to current version is ongoing, via LinkedIn Learning.
- California CTEC “*Registered Tax Preparer*,” 2011-2013; certified “*Microsoft Office Excel Specialist*”; Red Cross “*CPR and AED Certified*,” 1/2016-1/2018.
- Bachelor degree in *Finance / Business Administration*, California State University, Chico.

Employer Satisfaction:

- Presented with a Special Achievement Award “*in recognition of the manner in which you have completed your assigned tasks.*”
- Thank-you note e-mailed by former supervisor: “*The time you saved me tonight is greatly appreciated.*”
- Served clients in 17 contract positions for 5 staffing agencies; 5 seasonal clients/employers requested to re-engage; received letters of reference from 3 employers; and 3 temp jobs were extended or renewed.
- While one particular role was not mission-critical, it made life easier for 17 other people. “*Knowing that someone [else] is doing the PRs takes a weight off my shoulders.*”
- A finance manager’s reference letter states that “*the true character of a person is shown when they are given a job that no-one wants to do, and they do it well.*”

EMPLOYMENT

Key Employers

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| American Century Investments (6¼ years) | Applied Materials (contracting, 1 year) |
| Hewlett-Packard Company (contracting, 1 tax season) | Commercial Surety Bond Agency (internship) |
| VMware (2 quarterly contracts) | US Geological Survey (3¼ years) |
| Guidant Cardio-Vascular and Tyco Healthcare | C.J. Olson Cherries (consulting, 3 year span) |
| SLAC National Accelerator Laboratory (2½ year span) | Housing For Independent People (2½ years) |

Dates and Details Upon Request

Notable Job Titles

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| Mutual Fund Portfolio Accountant and MIS Liaison | Fixed Assets - Payroll - HRIS Accountant |
| Staff Accountant or Bookkeeper (on multiple occasions) | Personal Income Tax Preparer (pro-bono) |
| A/P Internal Auditor and Payables Accountant | Marketing Dept. Budgeting Specialist and A/P Liaison |
| Legal Dept. Finance Coordinator and A/P Liaison | Excel Solutions Architect (on multiple occasions) |