

Roger Chen

BUSINESS INTELLIGENCE DEVELOPER · CERTIFIED DATA SCIENCE ASSOCIATE · INFORMATION SYSTEMS/BUSINESS ANALYTICS MAJOR & MATH MINOR

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TOOL BOX

Data Analytics: Tableau, Power BI, SSRS, MicroStrategy, SPSS, SAS Analytics, Google Analytics/Ads, FICO Analytics, Microsoft Excel, XLMiner.
Programming: SQL, R, Python, Java, C++, VBScript, VBA Macro, XML, DAX, Power Query M.
Other Tools: Salesforce, SAP, Oracle PeopleSoft, Visual Studio, Smartsheet, Microsoft Office, Visio, Lucidchart, JIRA, Confluence, QuickBooks.

EXPERIENCE

UC Santa Barbara

Santa Barbara, CA

SENIOR BUSINESS SYSTEMS ANALYST – BUSINESS & FINANCIAL PLANNING TEAM

Sep. 2019 – Present

- **Business Intelligence:** Revolutionized, automated, and streamlined financial processes by establishing new robust, sustainable, and scalable management reports that reside on 20+ workspaces and apps that served 5 business units and 30+ audiences from directors to analysts.
- **Quantitative Data Analysis:** Gathered and translated end user reporting requirements into design documents, extracted and manipulated data from multiple data sources across SQL server, CRM and ERP systems, and developed storytelling visualizations that drove actionable insights.
- **Automation Dashboard:** Built intuitive and interactive dashboards that reduced average reporting time from 20 to 5 hours per week for the team.
- **UI Development:** Designed and built an in-house front-end interface program with MS Access to process project and activity transactions with customized functions, bound/unbound controls, VBA, macros, nested forms that are linked to SQL back-end on 100+ tables and views.
- **QA Testing:** Provided operational supports to troubleshoot, analyze, identify, document, and report FIDO (an in-house app with SOAP, REST APIs that validated and transferred data between the department and the UCSB central system) issues across SBX, TST, UAT, and PRD environments.
- **Mentorship:** Documented BI reporting processes, sources, and tips and provided trainings and supports to other analysts and interns.

Nortridge Software

Foothill Ranch, CA

PROGRAMMER ANALYST – TECHNICAL CONSULTING TEAM

Jul. 2017 – Jul. 2019

- **Strategic Planning and Decisions:** Led complex strategic projects and conducted in-depth analyses for service utilization to interpret consumer behaviors and drive insight and alignment and communicated business-critical information and provided strategic recommendations to senior stakeholders to strive for improved service quality, increased customer satisfaction, and higher retention rate.
- **System Implementation:** Conducted requirement analysis, process documentation, and ETL process to integrate a new CRM system that enabled the team to serve 18% more customers, reduced the average support ticket duration by 13%, and increased customer satisfaction by 15%.
- **Consulting Service:** Developed and built customized features and functionalities on the loan software with VBScript and SQL for customers.
- **Agile SDLC:** Planned, tested, and implemented projects with Agile model on cross-functional teams.

AXOS Bank

San Diego, CA

BUSINESS & TECHNOLOGY ANALYST – BUSINESS ANALYTICS TEAM

Sep. 2016 – Jul. 2017

- **Data Analytics:** Developed sales and marketing metrics and scorecards that evaluated and recommended the most reliable broker partners to work with based on the quality of all historical leads, which reduced average lead duration time in pipeline by 30% and increased conversion rate by 18%.
- **Business Process Improvement:** Designed incentive compensation system and built automation dashboards to populate real-time commission data that replaced manual spreadsheet calculation for multiple sales teams and reduced overall labor from 24 to 4 hours per month.
- **Financial Reporting:** Collected financial data, conducted profitability analysis, and built automation dashboards for 12 branches for the executives.
- **Budget Modeling:** Created budget model that factored historical data over the past 5 years to strive for <10% var. between actual and budget.

Big Brothers Big Sisters

Los Angeles, CA

ACCOUNTING SUMMER INTERN

Jul. 2014 – Nov. 2014

- **General Accounting:** Assisted the Director of Finance and performed functions with A/P, A/R, reconciliation, budgeting, and forecasting.

InnoCSR (NGO)

Shanghai, China

CASE CENTER MANAGER

May. 2013 – Aug. 2013

- **Case Management:** Increased the internal knowledge database by 60% in case studies and doubled the size of the case analyst team.
- **Web Design:** Upgraded the case center website with a more user-friendly interface using WordPress, which increased web traffic by 30%.

World Financial Group

San Diego, CA

FINANCIAL SERVICE ASSOCIATE

Dec. 2011 – Aug. 2012

- **Investment Management:** Helped clients develop diversified financial portfolios to reduce overall risks while striving for >6% ROI.

EDUCATION

Master of Science in Information Systems [Specialization in Business Analytics]

San Diego State University, 2016

Bachelor of Science in Economics/Management Science [Minor in Mathematics]

University of California, San Diego, 2011