

Roger Chen

BUSINESS ANALYST · 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, FICO Analytics, MS Excel/VBA Macro, XLMiner.
Programming: SQL, R, Python, Java, C++, VBScript, VBA Macro, XML, DAX, Power Query M.
Other Tools: SAP, Salesforce, Oracle PeopleSoft, Visual Studio, Smartsheet, Microsoft Office, Visio, Lucidchart, Jira, SharePoint, 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 reporting process by establishing new robust, sustainable, and scalable BI systems that improved user experience and actionable insights, served 5 business units and 30+ end users from Associate Vice Chancellor to analysts, and reduced report preparation time from 20 to 5 hours per week with real-time reporting and on-demand services.
- **BI Reporting:** Developed and maintained Power BI reports and services that are extensively supported with Data Modeling, Data Flows, Role Level Security, Gateway, Power Query M Language, JSON, DAX, Calculated Measures, Drillthrough, and Direct Query across 20+ workspaces and apps.
- **UI Development:** Designed and built an in-house front-end interface program with MS Access DB to add, edit, and delete records 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.

Nortridge Software

Foothill Ranch, CA

PROGRAMMER ANALYST – TECHNICAL CONSULTING TEAM

Jul. 2017 – Jul. 2019

- **Quantitative Analysis:** Created in-depth analysis based on client ticket volume, ticket type, time in service, total licenses, and 20+ measure values, which analyzed support service utilization, interpreted consumer behaviors, and provided strategic recommendations for service pricing adjustment, partnership agreement, and sustainability modeling 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%.
- **Project Management:** Gathered business requirements and collaborated development efforts with Agile SDLC model with cross functional teams.
- **Consultation & Training:** Produced self-help materials and provided hands-on training and support to internal employees and business clients.

AXOS Bank

San Diego, CA

BUSINESS & TECHNOLOGY ANALYST – BUSINESS ANALYTICS TEAM

Sep. 2016 – Jul. 2017

- **Data Analytics:** Extracted, transformed, and loaded raw data from multiple sources across SQL, CRM, and ERP systems that ensured data integrity and reliability to build storytelling visualizations and dashboards that generated information and insights for the stakeholders and the executives.
- **Data Visualization:** Created lead quality KPI 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 Enhancement:** 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

- **CSR Support:** Advocated Corporate Social Responsibility and provided educational materials to help companies in China implement CSR practices.
- **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.
- **Financial Education:** Assisted the team in conducting financial educational seminars and workshops for clients and prospects.

EDUCATION

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

San Diego State University, 2016

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

University of California, San Diego, 2011