

Professional Experience

Shakely Consulting

February 2022 – Present

- Hands-on experience leading integration, data migration, and customization workstreams, including triaging issues tied to business and functional requirements.
- Contributed across all phases of the implementation life cycle, including SIT, UAT, cutover planning, and post-launch support.
- Acted as lead on multiple projects, overseeing small teams with minimal supervision and managing release cycles using GitHub for version control, issue tracking, and code review workflows. Demonstrated strong analytical, communication, and presentation skills in both internal and client-facing roles.
- Applied Agile methodologies and participated in release management activities across cloud-based architecture projects. Familiar with SaaS and ERP systems, particularly Yardi; experience with NetSuite and other ERP platforms is ongoing.
- Developed and implemented a third-party integration between an AI-powered invoicing platform and Yardi Systems using Yardi's SOAP-based web services, enabling streamlined transfer of invoice, vendor, and document data. Trained AI and engineering teams on invoice ingestion and vendor upsert processes, enhancing automation and financial data accuracy.
- Designed and implemented ETL pipelines with a Blazor front-end written in C# and Azure Functions to process CSV exports from SQL procedures, convert them to Excel, apply table mappings, filtering logic, and generate embedded charts for visual reporting.
- Automated data workflows and job scheduling using PowerShell and Python for enterprise-scale SQL Server environments, improving reporting efficiency and ongoing system monitoring.
- Led end-to-end database optimization initiatives including data integrity audits, access policy configuration, and complex SQL performance tuning for fintech and real estate clients.
- Delivered a PowerBI analytics platform for a fintech startup in the Credit Union industry, integrating multiple data sources to provide dynamic dashboards and lending performance insights, empowering credit unions to target younger audiences and optimize loan offerings.
- Developed a lease abstracting platform using React, TypeScript, and Next.js, capable of parsing Excel files into a live-editable grid with export options (CSV/Excel), supporting seamless SFTP-based Yardi integration and automated scheduling for continuous data flow.
- Built repeatable Azure-based integration pipelines (Functions, WebJobs, Blob Storage, C#) for Yardi-to-Yardi migrations during property manager transitions, supporting monthly-to-weekly migration schedules across properties, GL accounts, books, and tenant data.
- Managed QuickBooks to Yardi migrations for three separate clients using similar Azure integration infrastructure and automation logic.
- Engineered a stored procedure-driven data extraction tool for exporting insurance claim invoice metrics to Origami Risk software in CSV format.
- Created an API-based solution to transfer payroll data from ADP to Yardi, formatting data with custom SQL procedures for accurate journal entry uploads.

Liberty Military Housing | Software Engineer

January 2020 – February 2022

- Migrated a suite of 30+ SQL-based custom reports into Yardi's Spreadsheet Reporting (YSR) technology. The transformation necessitated intricate SQL queries and templating, resulting in a more intuitive and user-centric data visualization mechanism.
- Created custom workflows and leasing solutions within Yardi to improve operational tracking for residential units.
- Led initiatives to enhance reporting and data-driven decision-making for Military Housing portfolios.

Hott Solutions | Software Engineer and Project Manager

May 2018 – January 2020

- Managed end-to-end implementations of Yardi Systems Investment Management and Advanced Budgeting software.
- Led functional workshops with asset management clients to design workflows, investment structures, and reporting.
- Developed data conversion strategies, including large-scale migrations from Entrata to Yardi.
- Built APIs supporting real-time data transfer for major clients including Amazon.com and Rentlytics.

Yardi Systems | Technical Consultant

January 2013 – May 2018

- Spent 2.5 years on the Investment Management team, supporting REITs, institutional investors, and owner-operators by tracking cash flows across complex investor-investment hierarchies and designing financial consolidation and elimination processes between general partners and properties.
- 3 Years as part of the Advanced Budgeting team, implementing Commercial and Residential clients with tailored market lease assumptions, and expense models.
- Collaborated directly with clients to analyze in-place leases, forecast NOI, and evaluate capital adjustments. Developed advanced reporting frameworks to enable data-driven decision-making and ensure compliance with financial goals. Additionally, supported variance analysis and created automated workflows for budget tracking and reconciliation.
- Delivered customized workflows for tracking capital contributions, distributions, and complex investment structures. Developed detailed portfolio performance reports, including IRR and ROI analysis, cash flow modeling, and fund-level KPIs. Collaborated with clients to streamline financial reporting processes and ensure alignment with GAAP standards. Provided hands-on support for multi-entity, multi-currency consolidations, fund-level audits, and financial data migrations to Yardi.
- Created custom SQL-driven tools, including stored procedures and dynamic queries, to automate financial reporting, KPI tracking, and variance analysis for clients with diverse operational needs.
- Served as a key technical consultant for JP Morgan Asset Management's transition from MRI to Yardi, with frequent on-site visits to ensure a seamless migration and alignment with their operational needs.

Education

California Polytechnic State University – San Luis Obispo
Bachelor of Science | Business Administration, *Accounting & Finance*

August 2008–December 2012