

JOSEPH SHAKELY

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Professional Experience

Shakely Consulting

February 2022 – Present

- Led functional solution architecture and ERP optimization initiatives for financial services, fintech, and real estate clients, specializing in Yardi Systems and cloud-based integrations.
- Conducted client workshops to gather requirements, map business processes, and design ERP solutions aligned with industry best practices.
- Architected full-cycle ERP migration strategies, including data mapping, integration scoping, user acceptance testing (UAT), and post-go-live support.
- Delivered integration and automation solutions using Azure, Power BI, and custom C# applications, improving operational scalability and decision-making.
- Developed SaaS integration models connecting Yardi with third-party platforms (e.g., AI invoicing systems, Origami Risk) to streamline finance and operations workflows.
- Designed and deployed customized ERP reporting frameworks and dashboards to enhance financial performance tracking and operational visibility.
- Helped streamline operational processes for a regional restaurant chain by modernizing reporting, optimizing workforce management, and improving online order integration, enhancing multi-location visibility.
- Delivered advanced budgeting and forecasting solutions for commercial and residential real estate clients, using scenario modeling and market lease assumptions to project NOI and improve financial planning accuracy.
- Designed and launched a PowerBI business intelligence platform for a fintech startup, integrating real-time lending data to support strategic loan expansion and member engagement for credit union clients.

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

- Delivered ERP solutions across Advanced Budgeting and Investment Management for REITs, institutional investors, and owner-operators.
- Led variance analysis, portfolio reporting, and fund accounting implementations aligned with GAAP.
- Supported ERP transitions for major clients including JP Morgan Asset Management.

Education

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

August 2008-December 2012