JOSEPH SHAKELY

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Professional Experience

Shakely Consulting   **February 2022 – Present**

- Developed OLAP cube-based models to optimize reporting performance for financial services clients, enhancing analytical depth and reducing report query times by over 40%.
- Implemented ETL pipelines using C# and Azure Functions to automate data migrations and performance-tuned SQL procedures for large financial datasets.
- Utilized PowerShell and Python scripts for automated data processing, job scheduling, and performance monitoring across SQL-based reporting systems.
- Performed end-to-end database optimization tasks, including access policy setup, data integrity audits, and query tuning for real estate and fintech clients.
- Designed and implemented a PowerBI business intelligence solution for a Financial Technology startup in the Credit Union industry, a fintech platform that helps users find and compare credit union loans. This project involved integrating data sources to create dynamic, real-time dashboards and reports that provided actionable insights into lending performance. The solution helped credit unions expand their reach, enhance loan offerings, and target a younger demographic by improving decision-making capabilities through comprehensive data analytics.
- Delivered Advanced Budgeting and Forecasting solutions, including scenario modeling and market lease assumptions, to project NOI and evaluate bottom-line impacts for commercial and residential real estate clients.
- Developed and implemented a third-party integration between an AI-powered invoicing platform and Yardi Systems to streamline the transfer of invoice, vendor, and document data via Yardi's SOAP-based web service. This involved training both the AI and engineering teams on the detailed processes of importing invoice data and supporting documents into Yardi, as well as performing vendor data upserts. The integration enhanced automation and accuracy in financial data management, improving overall operational efficiency for clients.
- Developed a lease abstracting platform written in React, Typescript, Next.js and deployed via Vercel, capable of parsing Excel datasets, enabling real-time web-based grid manipulation, and automated exportation to CSV or Excel for immediate SFTP-based Yardi integration. Additionally, automated task and schedule configurations were instituted for uninterrupted data transfer.
- Utilized Azure Functions, WebJobs, and Blob Storage, along with code written in C#, to create an integration solution for companies transitioning property managers for Yardi-to-Yardi conversions, which included mapping properties, GL accounts, books, and tenants, between databases, and making the process repeatable to perform these migrations starting with monthly migrations and transitioning to weekly.
- Used similar Azure functionality to migrate 3 separate clients from QuickBooks to Yardi.
- Developed a data extraction solution that employed a stored SQL procedure to aggregate and export all invoice metrics related to insurance claims from purchase orders. The data, in CSV format, was seamlessly incorporated into the Origami Risk Management Software.
- Developed an API-driven integration to facilitate the seamless transfer of payroll data from ADP to Yardi as journal entries. Utilized custom SQL procedures to reformat the data for Yardi compatibility.

Lincoln 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.
- Formulated an innovative workflow via custom triggers within Yardi to strategically transition residential units into a "down status," enabling precise occupancy percentage tracking.
- Designed a new suite of resident leases tailored to the company's Military Housing portfolio within Yardi.

Hott Solutions | Software Engineer and Project Manager   **May 2018 – January 2020**

- Managed end-to-end implementation of Yardi Systems' Investment Management software, catering to asset management firms with intricate investment structures, cash flow paradigms, and reporting demands.
- Spearheaded the implementation of Yardi Systems' Advanced Budgeting and Forecasting for Commercial and Residential real estate firms. This involved utilizing market lease assumptions and expense models, as well as analyzing in-place leases to forecast NOI and below-the-line capital adjustments according to client requirements.
- Converted detailed general ledger records and over 150,000 associated images and documents from an Entrata database into Yardi. The process involved inserting all records into the Yardi database, replicating front-end data entry processes resulting in all transactions, images, and documents being accessible from the Yardi front-end/UI.
- Developed APIs that were used by Amazon.com and San Francisco-based multi-family data analytics company Rentlytics. These APIs automatically and periodically extract real-time tenant data to each respective client.

Yardi Systems | Technical Consultant   **January 2013 – May 2018**

- 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.
- 2.5 Years as part of the Investment Management team, working with REITs, institutional investors, and owner-operators to implement fund accounting solutions. 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   **August 2008-December 2012**

Bachelor of Science | Business Administration, *Accounting & Finance*