



Executive Summary



I followed up on a request to clean an Excel sheet and ended up improving SaaS margin visibility by redesigning how financial, sales, and cloud data moved.

Improper data habits don’t just create reporting inefficiencies; they introduce decision risk. Recognizing this exposure, I focused on reinforcing the data practices required for reliable analytics at scale rather than producing reckless dashboards.

The result was a scalable margin framework that increased financial clarity, reduced interpretive ambiguity, and supported more confident operational planning.

Business Context & What Wasn't Working.



Previously, Margin reporting relied on fragmented cost sources, inconsistent contract classifications, and siloed calculations that allowed structural ambiguity to propagate into leadership reporting.

These conditions created hidden risk: materially different margin outputs could emerge depending on how data was grouped, filtered, or interpreted.

During a period of limited organizational capacity, I initiated a redesign centered on clarity, validation, and usability.

What I delivered to the team.

Established a Validate + Context Operating Model	Dashboard Suite with Use-Case Driven Simulations.
Introduced structural validation checkpoints and contextual fields for complex transformations to prevent downstream ambiguity, shifting clean data from an afterthought to a proactive goal.	Prioritized simulation capability and margin interpretability over static reporting in dashboards, enabling leadership to evaluate scenario analysis, rather than simply calculating metrics.
Built a Pipeline Designed for Analytical Integrity	Made Data Explainable
Structured upstream data transformations to standardize multi-source financial inputs, reduce contract ambiguity, and ensure margin calculations reflected the most reliable available data — strengthening confidence for downstream leaders.	I developed several prototypes, 3 executive walkthroughs, and numerous supporting resources that outlined the goals, expectations, and underlying logic in the pipeline. This collaboration strengthened stakeholder trust and helped explain the data.