

UTKARSH MESHARAM

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PROFESSIONAL SUMMARY

Business Analyst with experience supporting operations and finance teams through financial MIS, data reconciliation, and CRM–ERP reporting workflows. Worked closely with finance stakeholders to improve data accuracy and reporting reliability across operational and financial systems. Experienced in validating invoices and credit memos to ensure billing completeness and reporting accuracy.

PROFESSIONAL EXPERIENCE

Business Analyst | Dhaninfo Pvt. Ltd. | Sep 2024 – Present | Nagpur

- Owned end-to-end business and functional requirements (BRD / FRD) for financial and operational reporting, ensuring accurate data capture and consistent reporting across BAU activities.
- Delivered daily and weekly management MIS covering workforce utilization, salary inputs, open invoices, pending payments, work orders, and operational backlogs for finance and operations stakeholders.
- Reconciled invoices and credit memos between CRM and ERP systems, identifying missing or mismatched records and ensuring billing completeness prior to financial reporting.
- Worked closely with finance and accounting teams to identify data gaps, ensure correct system entries, and strengthen reconciliation between operational and financial systems.
- Automated and standardized financial reporting using Advanced Excel (VBA), Power Automate, and Power BI, reducing manual effort by ~75% while improving reporting accuracy and consistency.
- Performed budget vs actual and variance analysis across branches to track operational spend and highlight cost leakage, including completed work pending invoicing.
- Tracked utilization of workforce and materials, monitored overdue work orders and tickets, and flagged timeline deviations impacting invoicing and cash flow.
- Acted as functional owner for Aspire CRM and supported Acumatica ERP workflows related to invoicing, payments, and reconciliation.

CORE COMPETENCIES

Financial MIS & Management Reporting • Data Validation, Reconciliation & Controls • Budget vs Actual & Variance Analysis • Business Analysis & Requirement Ownership • Utilization & Exception Reporting • Finance & Operations Stakeholder Coordination • Process Governance & Escalation • UAT Support • Cross-Functional Coordination • Agile / Iterative Delivery

TOOLS & PLATFORMS

Advanced Excel (Automation, VBA) • Power Automate • SQL • Power BI • Aspire CRM • Acumatica ERP • Microsoft 365 Tools (Outlook, Visio)

EDUCATION

Bachelor of Engineering - Electrical Engineering
St. Vincent Pallotti College, Nagpur | CGPA: 8.3

CERTIFICATIONS

Microsoft Power BI Certification | Exploratory Data Analysis in Excel | Introduction to SQL | JPMorgan Excel Job Simulation (Forage)