**Saad Rouane**  Fate/Rockwall, TX | Tel: (469) 237-5553

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**PROFESSIONAL SUMMARY:**

6 + Strong years’ experience in using Microsoft Suite (Management Studio, Business Intelligence Development Studio) (SQL) Server Integration Services (SSIS), SQL Server Reporting Services (SSRS), SQL, Powerbi and Tableau. Quick learner who strives for new technical knowledge and always maintained positive communications and working relationships at all levels. Strong troubleshooting and problem-solving skills. Strong ability to manage and prioritize multiple projects and tasks with excellent requirement gathering skills for management and end-users.

**EDUCATION/CERTIFICATION:**

**Master in Business Administration (MBA)**

Texas A&M University-Commerce

Commerce Texas **December 2009**

United States.

**Technical Competencies:**

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| --- | --- |
| **Database Tools** | SQL Server Management Studio(SSMS), SQL Profiler, Query Analyzer, DTS Designer, Index Tuning Wizard, PostgreSQL, SQL Login for event handler |
| **GUI Tools** | SQL Server Business Intelligence Development Studio, Visual Studio 2012 / 2014 / 2016 |
| **Languages** | T-SQL, XML, some C# |
| **OLAP Tools** | SSAS (Cube), SSRS. Report Builder |
| **Tools and Packages** | SQL Server Management Studio, SQL Server Business Intelligence Development  Studio (BIDS), SSIS,(ETL)  SharePoint. |
| **ETL Tools** | SSIS, DTS, Import/Export SQL Wizard. |
| **BI Tools Dashboard**  **Microsoft;** | Tableau Desktop, Power BI, SSRS, Power Query, Power Pivot Excel (Pivot table, V-Lookup .X-Lookup, Cube member, Cube value SUMIF, SUMIFS, XIRR).  VBA Visual Basic programing.  Microsoft VISIO used in building workflow processes |
| **Temenos: Credit unions software** | Building workflows, views, Dashboard and reports using power BI builder |
| **Ticketing and workflow** | Jira, Confluence |

**Colmore Inc.**

Role: Business Intelligence Developer **Mar 2022 – May 2023**

**Responsibilities:**

* Developed advanced SQL queries, T-SQL Procedures, SSIS Packages, SSRS and Power BI Funds’ performance paginated reports for our Fund managers using cascading parameters.
* Trouble shot SSRS and power bi reports as well as complex stored procedures.
* Validated and embedded reports to colmore`s Helios platform for Fund managers and general partners to run.
* Converted FIA Front Excel legacy reports with VBA codes to excel formulas pointing to the Data warehouse using power query and complex SQL stored procedures
* Procedure Performance tuning for faster rendering reports.
* Migrated SSRS Reports to Power bi environment
* AD Hoc complex SQL and power bi trouble shooting Tasks requirements.
* Migrated Excel files to side table sin SSMS to use in different stored procedures responsible for Fund managers (GP) and Limited partners (LPs) investments exposure reports.
* Helped redesign Business requirement documents for different different SQL / Power bi reports.

**Hilton Worldwide (Short term project)**

Role: Business Intelligence Analyst

**Jan.2022 – Mar 2022**

**Responsibilities:**

* Collected, edited, aggregated, and analyzed data from Salesforce and Legal Data Platforms to drive owner enterprise intelligence and global data integrity.
* Conducts routine tasks as directed / produces and responds to actionable reports and data request that show key data indicators (changes that need to be made), while documenting processes to identify possible areas of improvement into current operations.
* Providing reporting solutions and respond to ad-hoc report requests across multiple business areas with quantitative and qualitative data analysis and reporting of patterns, insights, and trends to decision-makers.
* Participated in the design and development of business intelligence reporting tools.
* Created views in SQL and crafted corresponding reports in Tableau of old retired sales force reports.

**EECU**

Role: Business Performance Analyst / BI Developer **Jan 2021 – Jan 2022**

**Responsibilities:**

* Improved, added dashboard reports to the existing Excel workbooks for Direct lending; Collection

and Real estate using stored procedures built in SQL; power query and Power Pivot in the workbook`s data model

* Ran eight daily reports including direct lending collection and collateral reports as well as trouble shooting slow running stored procedures by adding parameters; table joins; Indexes and analyzing the execution plan.
* Updated the weekly call center NPS( Net Promotor Score) dashboard and Financial centers lobby visits reports by extracting data source from Medalia , Kronos and I-Business platforms based on previous week`s data.
* Developed complex stored procedure in SQL primarily for direct lending Collection and real estate Dashboards.
* Built process improvement workflow using Visio for manually declined loan applications processed from the previous day that are manually processed for other underwriters to review for a second decision.
* Created ETL package using SSIS to run a stored procedure in SQL that migrate data set to CSV file for team member to use as a list in SharePoint within the underwriter denial loan project.
* Built complex stored procedure to produce the right data set that include computed fields like DTI (Income to debt ratio) and Amount to live on as well as validating outputs against Merdianlink data summary for each loan number.
* Created and scheduled SQL agent jobs to run ETL Package every day at 6 am to load into SharePoint list.
* Built Dashboards and views with criteria and mapped fields as well as different reports using SSRS report designer in Temenos then adjusted reports based on end-users requirements.
* Helped in building workflows in Temenos like workout loan, hardship loans, Door knocks, Repos for collectors to work, then created reports from scheduled extracts for trailing 7 days.
* Built Promise-to-pay dashboard using power query and power pivot added to the data model with trailing 7 days.
* Change requests like adding parameters to stored procedures and adding more fields to the data sets from SQL.
* Working on retiring our legacy reports in Excel workbooks to SSRS and Power Bi solutions that will be delivered in the cloud to end users in direct lending; Real estate and collection departments.
* Built exception reports for Loans with duplicate tracking 45 (Total loss Insurance claim) that show same loan number with one closed and the other still open using SQL script and Symitar episys then mapping dataset to the data model to create the exception Pivot table reports for the direct loan service team to review and correct every day.
* Developed a complete missing loan information solution Dashboard for financial centers to review at the beginning of each month using a complex stored procedure and case statement in SQL with an Executive summary Dashboard that displays percent error by branch.
* Working on migrating and integrating the indirect lending team from episys Symitar to Temenos work environment.

**Avantax Inc *(Formally HD Vest).***

Role: Financial Data Analyst II / BI Developer. **Oct 2018 – Jan 2021**

**Responsibilities:**

* Prepared; analyzed and audited company monthly financial and operational reports.
* Responsible for producing and analyzing financial rolling gross for an average of 3500+ financial advisor; their monthly and year-to-date growth by production ranges; new advisor count; advisor termination (U5) along with their production at termination; same store sales growth using Pivot tables, V-lookup and SQL Queries.
* Built robust data mart relating to financial advisors production via ETL packages from Excel to OLTP then to an OLAP environment for analytics using Tableau Desktop.
* Average monthly rolling twelve S&P 500 computations to compare against same store sale production change.
* Assisted and reported to the CFO in preparing financial reports and forecasts as well as updating and monitoring the budget plan per GL account then reforecast based on the run rate.
* Prepared periodic Dashboard reports that compare budgeted to actual costs using Tableau desktop.
* Enabled SQL Logins events for all my SSIS packages in order to track failed package errors.
* Built a .NET application using C# codes to extract Multiple Excel files to load in SQL database destination.
* Built relationships with business partners and collaborated to identify reporting requirements and solutions.
* Budget variances analysis at the corporate and departmental level along with drilling down into variance drivers using Tableau, Microsoft Forecaster, Great Plain, Microsoft management reporter and Excel master budget file along with communicating variance reports to senior management.
* Developed Cascading parameterized SSRS reports to drill down on advisor production at termination per states.
* Ran monthly financial analysis statements reports along with trial balances using report designer of Microsoft dynamic.
* Ran monthly Asset Under Management (AUM) reports by Mutual Funds sponsors and by advisor
* Budget re-forecast based on run rates and general ledger accounts activity trends.
* Prepared monthly advisor sales reports.
* Built and maintained financial dashboards highlighting company insights like same store sales KPI.
* Effectively translated business requirements into visual solutions for interactive dashboards.
* Initiated and Built Avantax Analytic center of excellence (COE) for report process documentations and stress testing.
* Produced meaningful insights (KPI) to support decision-making.
* Built financial advisor Dashboard showing Total rolling 12 productions (RG) versus prior; Asset under Management (AUM) and its last 6 months trends.
* Updated budget plan in Microsoft Forecaster by GL account.
* Fetched dataset to compute the financial planning Institute`s return on investment for low producing advisor.
* Used cubes as an OLAP mode to provide data model for financial reporting and client applications like Tableau and reporting services.
* Created and called Stored procedure using temp tables and case statement to pull facts by week to date Month to date and year to date format to be visualized using SQL Service reporting services
* Built loan Mortgage project from scratch using SSIS to build and load to a data warehouse and cubes to be able to report on the real time loan status.

**Spectrum Enterprise**

**Oct 2017 Sept 2018**

Carrier Sales Data Analyst**.**

**Responsibilities:**

* Created, managed, and maintained a database of all TX Carrier quote/ order details and activities to produced tracking metrics and reporting for sales activities (incl. quote history/status, sales funnel updates, close/win ratios/trending, order details, geographic.
* Created documentation and managed a knowledge repository which included all customer contracts and orders/ approvals, business rules, quoting tools, training manuals, sales reporting and metrics, and historical

Archives

* Created, managed, and maintained a database to produce tracking metrics for external team dependencies as it relates to sales activities, such as design(s), costs, approvals, order entry, order process flowing/installation. Resulting in pro-active team meetings and the formalization and implementation of an escalation process using SSRS parameterized and drill down reports.
* Developed and maintained relationships with Carrier accounts to facilitate open communications, increase opportunity potential, and encourage reciprocal business, by participating in face to face meetings/conference calls, providing customized solutions, and producing customized reporting using Excel SSRS and Tableau Desktop meet their needs.
* Provided direct support to customers regarding order, quote, and billing inquiries.

**Kibo Software Inc.**

Role: SQL BI / Tableau Developer **Apr 2015–Oct 2017**

**Responsibilities:**

* Involved in creation of various Business Intelligent/ Analytical Dashboards over various lines of business utilizing Tableau desktop.
* Experience with migration of data from excels to SFDC through apex data loader such as import, export and update the data.
* Worked extensively in Tableau with Advance analysis Actions, Calculations, Parameters, Background images, Maps.
* Good understanding of the CRM processes. Business knowledge of Sales cloud. Business knowledge of Quote to Cash (Steelbrick).
* Created action filters parameters and calculated sets for preparing dashboards and worksheets in Tableau
* Generated Tableau Dashboards with quick/context/global filters, parameters and calculated fields on Tableau reports
* Participated in AGILE iterative development methodology.
* Optimized the performance of queries with modification in T-SQL queries, normalized tables, established joins, and created indexes.
* Create various Stored Procedures to validate the data from the source and update/insert the records into target tables.
* Created stored procedures, triggers, user-defined functions, views handling business logic and functionality of various modules.
* Created User Defined Functions to encapsulate frequently and commonly used business logic making the system more modular, secured and extensible.
* Performed data extraction, transformation and loading (ETL) between legacy system using SQL tools such as SSIS.
* Built SSIS packages to load the Data into Staging, ODS and dimensional model.
* Applied various data transformations like SCD (Slowly Changing Dimension) to maintain the history of the data, aggregate, multicasting, conditional split and derived column.

**IPeople Software**

Role: SQL Server/ ETL Developer **Mar 2014 – Apr 2015**

**Responsibilities:**

* Designed SSIS packages to bring data from existing OLTP databases to the new data warehouse by performing different kinds of transformations like lookup transformations, merge joins, derived columns, conditional split, data conversion with multiple data flow tasks.
* Created packages in SSIS with error handling as well as created complex SSIS packages using proper control flow and data flow elements.
* Troubleshooting of processes, issues, and errors in SSIS Packages to improve their performance.
* Used Notification Services Available to create alerts and email notification.
* Create/monitor scheduled data warehouse jobs using SQL Server Agent jobs.
* Configured SQL mail agent for sending automatic emails when a SSIS packages is failed or succeed.
* Created SSIS Packages to perform filtering operations and to import the data on daily basis from the OLTP system to SQL server in XLS and XML format.