

Finance Analytics - Portfolio Use & Career Advice

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Purpose of This Project in Your Portfolio

This Finance Analytics project is designed to demonstrate **end-to-end analytics thinking** and not just technical execution.

When someone reviews your portfolio, they should quickly understand that you can:

- Translate a **business problem** into analytical requirements
- Structure data in a **maintainable and scalable way**
- Build **finance ready dashboards**
- Communicate insights clearly to non-technical stakeholders

This project is not about showing advanced finance theory or complex engineering. It is about showing **clarity, structure, and decision-oriented thinking**.

Turning the Project into a Portfolio Case Study

What the case study is (and isn't)

This case study is:

- A professional summary of an analytics project
- Something a recruiter can skim in 2-3 minutes

It is **not**:

- A full technical walkthrough
- A tutorial
- A list of tools or code snippets

The goal is to create **credibility** versus focusing on “completeness”.

Recommended Case Study Structure

1. Project Overview

Briefly explain what the project is and what you built.

Include:

- Type of company (e.g., retail)
- Overall goal (finance analytics & reporting)
- Main tools used (Python, DuckDB, SQL and Power BI)

Example:

Finance analytics project for a retail company focusing on building a structured P&L, operational dashboards and scenario analysis using a delta lake layered data model.

Keep this short and factual.

2. Business Problem

Explain **why** the project exists.

Focus on problems like:

- Finance data spread across multiple sources
- Manual or inconsistent reporting
- Limited visibility into profitability and performance drivers

Avoid technical language here and remember that this should be read like a business problem statement.

3. Data & Architecture (High Level)

Describe the solution approach without going deep into implementation.

Mention:

- Raw → Bronze → Silver → Gold structure
- Purpose of layering (clarity, traceability and scalability)
- Separation between storage, transformation, and reporting

One or two paragraphs is enough here, no need to go into much more detail.

4. Dashboards & Analysis

This is where screenshots matter more than text.

Highlight:

- P&L report (finance structure)
- Operational performance dashboard (trends & drivers)
- Scenario analysis dashboard (decision support)

Explain briefly what each dashboard enables and supports versus focusing on how it was built.

5. Outcome & Value

Summarize what the project delivers.

Examples:

- Clear financial visibility
- Easier performance monitoring

- Better support for decision-making

This ties the entire project back to business value, which is what we want to showcase and display.

How to Reference the Project on Your CV or LinkedIn

The project should appear as **one strong bullet** and not a long section in your CV.

Focus on:

- Scope
- Ownership
- Outcome

Example:

Built an end-to-end finance analytics project with SQL, DuckDB, and Power BI including P&L reporting, operational dashboards, and scenario analysis.

Avoid:

- Listing every tool
- Listing every table
- Listing every metric

Less is more here, again, try to think about how it is for the “other person” to read through and understand this.

How to Explain the Project in Interviews

The 60–90 Second Explanation Framework

When asked about your project try your best to use this structure:

Context - What kind of project was it?

- “I built a finance analytics project for a retail company.”

Problem - What problems were you solving?

- “Finance reporting was fragmented and largely manual making it hard to understand profitability.”

Solution - What did you build?

- “I designed a lake house layered data model and built dashboards for P&L, operations and advanced scenario analysis.”

Impact - Why does it matter?

- “This made financial performance easier to understand and supported better decision-making.”

This works for both technical and non-technical interviews.

How to Handle Common Interview Questions

“What was the most challenging part?”

Good answers focus on:

- Scoping
- Tradeoffs
- Design decisions

Example:

“Deciding which data to focus on, what to visualize and what to leave out for now was the more challenging part as there are more possibilities in terms of data and use.”

“What would you improve if you had more time?”

Try to show reflection on what you could have done, instead of “regretting” not doing it yet. Keep in mind working with data is something that is a continuous process, not one-off work.

Examples:

- More detailed KPIs
- More advanced scenario modeling
- Deeper financial metrics

Also remember to refrain from anything in terms of saying “I would rewrite everything” or “I would redo everything if I could”.

“What did you learn?”

Try to tie learning to the more important business-oriented parts, which are:

- Business understanding
- Communication
- Structuring analytics work

What Not to Over-Explain

Many candidates make this mistake spending too much time on technical aspects.

Avoid spending time on:

- SQL syntax
- DAX formulas
- Table names
- File structures

Instead try to emphasize:

- Why decisions were made
- How insights were used
- What tradeoffs you considered

How This Project Fits into a Strong Portfolio

This project is best positioned as an **analytics project** demonstrating finance, modeling, and storytelling

I would say that it works especially well alongside one operational analytics project and another domain-specific project (marketing, supply chain, etc.)

Together, these show range and depth across business functions and business knowledge.

Key Takeaway

This project is valuable because it shows that you can:

- Think end-to-end
- Communicate clearly
- Build analytics that support decisions

Keep in mind that as data professionals we do not need to sound advanced, but we want to sound **structured, intentional and confident**.