

# Don Lim

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Financial systems analyst specializing in financial systems, business analytics, and process automation. Experienced in IBM TM1/Planning Analytics, Salesforce CRM, SQL, and Python. Proven ability to enhance forecasting accuracy, streamline reporting, and optimize cross-department workflows. Transitioned from IT to finance to bridge business and technology. Earned a terminal master's degree at Texas Tech University, integrating econometrics and optimization to drive data-driven decision-making.

## WORK EXPERIENCE

### Green Brick Partners, Inc.

Plano, TX

*Senior Financial Systems Analyst, Finance and Operations*

Nov 2024 — Oct 2025

- Built and automated IBM TM1/Planning Analytics TI processes and business rules, integrating first- and third-party tools (PAW, Excel, FileZilla, Cognos Command Center, Arc, Pulse, TM1py, Git), enabling daily forecasting instead of biannual cycles.
- Programmatically maintained Planning Analytics OLAP database with 42 cubes, 88 dimensions, and supporting control objects, using MDX, SQL, TurboIntegrator (TI), and TM1 rules across dev, UAT, and production.
- Developed a land cash flow module with cost-to-complete spreads and payout schedules, cutting forecast preparation time by 50%.
- Converted mortgage forecasting from Excel to Planning Analytics, improving calculation speed, granularity, and data integration; collaborated with the Controller to enhance accuracy of loan and headcount assumptions.
- Designed automated, interactive dashboards for financial managers and executives, replacing SSRS reports and reducing board package prep time by 75%.
- Implemented and managed Git repository for TM1 processes, maintaining version control and SOX/ITGC compliance through automated audit scripts.
- Optimized Excel-based forecasting templates using Power Query, dynamic arrays, and nested functions to resolve calculation and refresh errors.
- Automated ETL pipelines for P&L, SGM, GL, KPI, and budget data, improving data accuracy and reducing manual processing.
- Oversaw Workiva and Land Proforma integrations with TM1, configuring APIs and database mappings.
- Built proof of concept for TM1-to-Power BI export via Python (TM1py), REST API, and DAX for dynamic visualizations.
- Documented all Planning Analytics processes, rules, and applications to support governance and team onboarding.

### Sales and Marketing Analyst, IT

May 2023 — Nov 2024

- Administered Salesforce CRM, Marketing Cloud, and Sales Cloud environments; implemented and tested enhancements across dev, UAT, and production.
- Created Salesforce dashboards, reports, workflows, and automated campaigns, improving visibility for 200+ end users.
- Cleaned, validated, and deduplicated Salesforce data using regex, SOQL, and Data Loader, increasing data accuracy.
- Served as system administrator for ERP and business tools (Constellation NEWSTAR, BuildPro, Calendly, DocuSign).

### DocuNav Solutions

Frisco, TX

*Support Engineer*

Jun 2022 — May 2023

- Built, tested, and deployed Laserfiche document management solutions (Quick Fields, Workflow, Forms) that automated document OCR, extraction, routing, and classification for corporate, legal, and school district clients.
- Maintained non-clustered SQL servers (stored procedures, task scheduling, SSL/TLS configuration).
- Managed document- and user-level security via Active Directory and admin consoles.
- Provided IT support for workstations, laptops, and peripheral devices.

## EDUCATION

### Texas Tech University, Department of Agricultural and Applied Economics

Lubbock, TX

*Master of Science in Agricultural and Applied Economics, GPA: 3.6/4.0*

May 2022

- Relevant coursework: Causal Inference, Optimization, Econometrics I & II, Production Economics, Machine Learning, Macro/Microeconomics.
- Tools and methods: R (tidyverse), Stata, MATLAB, Python, SAS, L<sup>A</sup>T<sub>E</sub>X; econometric methods including OLS, IV, DiD, RDD, matching, and clustering.

### CEVRO Institute, School of Political Studies

Prague, Czech Republic

*M.A. in Political Science, Philosophy, and Economics (PPE)*

Jun 2019

**Scholarship:** Full Tuition for Academic Excellence

### University of Michigan, College of Literature, Science, and the Arts

Ann Arbor, MI

*Bachelor of Arts in General Studies (Political Science, Philosophy, and History)*

Apr 2016

## RESEARCH EXPERIENCE

### Free Market Institute, Texas Tech University

Lubbock, TX

*Economic Research Assistant*

Aug 2020 — May 2022

- Conducted economic literature reviews and statistical analyses for academic publications and book chapters.

### American Institute for Economic Research

Great Barrington, MA

*E.C. Harwood Visiting Research Fellow*

Dec 2018 — May 2019

**Free Market Institute, Texas Tech University**

Lubbock, TX

*Visiting Research Scholar**Sep 2018 — Dec 2018*

- Researched and presented master's thesis on the economic organization of open-source communities.

**Commonwealth Foundation**

King of Prussia, PA

*Research Fellow**Jan 2017 — May 2017*

- Designed visual reports of Pennsylvania's tax and expenditure data to support policy publications.
- Authored and edited weekly newsletters on state budget and education reform.
- Responded to legislative and public inquiries on fiscal and labor policy.

**Cato Institute**

Washington, DC

*Research Intern, Center for Educational Freedom**Sep 2016 — Dec 2016*

- Analyzed international education datasets (TIMSS, PISA) to evaluate policy impacts.
- Summarized congressional proceedings on education, trade, and monetary policy.
- Produced 200+ social media data visualizations for @HumanProgress.

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**CERTIFICATIONS AND EXAMS**

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- PostgreSQL for Everybody Specialization  
*Skills:* PostgreSQL, DBeaver, NoSQL, Elasticsearch      Coursera, *May 2024*
- Web Applications for Everybody Specialization  
*Skills:* MySQL, PHP, JavaScript, jQuery, JSON, XAMPP      Coursera, *Oct 2023*
- Applied Data Science with Python Specialization  
*Skills:* Python (regex, Pandas, scikit-learn), ML algorithms (random forest, SVC, logistic regression, KNN, Naïve Bayes, clustering)      Coursera, *Aug 2023*
- Django for Everybody Specialization  
*Skills:* Django, SQLite, HTML5, CSS, JavaScript, Bash      Coursera, *Jul 2023*
- Probability Exam (SOA)      Society of Actuaries, *May 2023*
- Laserfiche Gold & Platinum Certifications      Laserfiche, *Oct 2022*