

Sara (JiaLin) Shang

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Sr. Data Analyst | Data Specialist | [LinkedIn](#) | [GitHub](#) | [Web Profile](#)

Qualification

- ✓ Retail - 2 yrs
- ✓ Financial Services - 1 yr
- ✓ CRM - 2 yrs
- ✓ Campaign – 1 yr
- ✓ Data Analytics - 4 yrs
- ✓ Data Science - 2 yr
- ✓ Data Quality - 3 yrs
- ✓ Data Visualization - 3 yrs
- ✓ Python, R - 5 yrs
- ✓ SQL – 3 yrs, Excel Automation
- ✓ ETL: Pyspark, Stored Procedure
- ✓ BI: Tableau, Power BI - 2 yrs

- **Core competencies:** Financial Analysis, Data Analytics, Data Science, Dashboard, ETL/ELT, Azure Cloud

Intern Experience

Data Analyst | [APPLICA Solutions](#)

Jan 2023-Present

- **Data Pipeline & Integration:** Extracted, cleansed & integrated Transaction, Customer and Campaign data from Zoho CRM Application, Database through REST API, python and SQL ([Work](#))
- **Customer Segmentation Dashboard:** Implemented Customer grouping in BI (RFM model) and AI (K-means) ways; A/B tested with targeted campaigns performance before and after ([Work](#))
- **Email Campaign Analysis:** Evaluated Email Campaign performance through KPI analysis, such as click, conversion, retention and churn rate via SQL & Dashboard ([Work](#))
- **CRM Application Enhancement:** Integrated clustering Customer Segmentation and Recommendation based products result back to Zoho CRM, which improved efficiency of Targeted Campaigns by 26%

Data Analyst | [HowBuy Wealth Management CO., LTD](#)

Nov 2020-Jun 2021

- **Fund Performance Evaluation:** Conducted **Variance Analysis** with Comparison to Benchmarks, Comparison to Competitors and alert on under-performed portfolio through threshold setup; Identify **Patterns, Trends, and Anomalies:** Pinpointed recurring trends in our funds through history analysis. detected anomalies, such as unexpectedly dropped by 5% in a stable market month
- **Investment Dashboard & Reports:** Created various reports on **Fund Performance** with time series analysis; **Asset Allocation**-offering insights into our investment strategy and **Market Conditions monitoring** which ensured awareness of broader market influences for our stakeholders

Investment Strategies Assistant | [CreditEase Wealth Management Co., LTD.](#)

Jul 2020-Oct2020

- **Data-Driven Strategy & Analysis:** Extracted Equities data from Bloomberg and real-time price data from Wind platforms; worked with the strategy team to employ ARIMA model on risk forecasting & evaluation
- **Marketing research & Influence:** Conducted market research on 20 years' stock, bonds data for wealth management industry; Published investment guidelines on Global Asset Cycle Performance, drawing an 18% uptick in page views, exemplifying effective communication of complex data insights

Education

Master of Science in Business Analytics | [Brandeis International Business School](#), MA

Aug 2021-Dec 2022

Bachelor of Science in Business Analytics & IT | [Rutgers University](#), NJ

Aug 2016-Jun 2020

Project Experience

Credit Risk Project | 01/2023 | [Work](#)

- Translated requirement to SQL language with deep understanding of banking and trading process;
- Generate a report that satisfies the template through SQL code and Power BI

Email Campaign Analysis through Data investigation (SQL) | [Work](#)

- Worked closely with business and created various KPIs to evaluate the performance and efficiency of Email Campaign, such as conversion rate, response rate, retention and churn rate etc.

CRM RFM Model for Customer Segmentation Analysis (Dashboard using Power BI) | [Work](#)

- Segmented customers into multi-groups through RFM scoring using PBI dashboard; prepared the distribution list based on specific campaigns with marketing team, improved target accuracy by 30%