

PROFILE SUMMARY

Sr. Business Analyst, with **5 years'** experience in **financial analysis** and **data handling** in various industries, such as **Retail Banking, Insurance, Education** and **Consulting**. Apart from being excellent **client relationship builder** and **problem-solver**, Emmi is a great team player to work with.

EXPERTISE

- ✓ **Banking**, Application System
- ✓ **Insurance**, Financial Analysis
- ✓ **Retail, Education**
- ✓ **CRM & Marketing**
- ✓ **Business Requirement** Documentation(BRD)
- ✓ **Data Cleansing, Visualization** and **Dashboard**
- ✓ **Process Automation**
- ✓ **Project Coordination, Client Relationship**

TECHNICAL SKILLS

Business Intelligence: Advanced Excel, Google Analytics, Microsoft Power BI
 Database & Platform: Cloud Snowflake Data Warehouse, Microsoft Access, Banking Application System
 Related Tools: Advanced SQL, VBA/Marco, Draw.io, Jira, ServiceNow

PROFESSIONAL EXPERIENCE

Wealth Operation Analyst		TD Wealth, Toronto, ON	Feb 2022 – Present
Operational process	<ul style="list-style-type: none"> Analyzed bank account transactions to ensure regulatory compliance; handle 40 customers' requests daily Maintained key controls & governance in line with the Bank processes to mitigate potential risks 		
Banking System	<ul style="list-style-type: none"> Possessed AP System experience using TD Banking Systems (WSR, RPD, WTS, SMS, EIS and ISM) Identified root cause of data issues across various platforms and analyzed data quality integration issue Assisted with system testing of 2 IT related projects and conducted User Acceptance Testing of deliveries 		
Financial Reporting	<ul style="list-style-type: none"> Reconciled, validated account transactions and determined operational KPIs for department reporting Created Weekly SLA Dashboard to support Department performance evaluation and decision making Conducted variances/gap analysis on seasonal performance trending, Monthly workload KPIs current vs. previous and actual vs. forecasting, which largely improved reporting accuracy 		
Data Analyst Intern		EDPYPF Services Inc., Markham, ON	Sep 2021 - Dec 2021
Dashboard & Reporting	<ul style="list-style-type: none"> Improved Financial income statement report process efficiency by 80% using VBA Automation Gathered business requirement based on existing report, data investigation, user story and client meeting. Delivered Customer Migration Dashboard, which improved campaign target accuracy by 28% 		
Business Data	<ul style="list-style-type: none"> Drew Process Workflow chart & optimized Process Automation for internal training purpose Collected and cleansed data for over 30 tables in Snowflake data warehouse for Reporting purpose Customer data quality control to fix duplicates, slowly changing and integration issues prepared project performance reports, updated project status weekly, briefed the project manager; ensured proper escalation process to mitigate project risks 		
Business Analyst		PICC Property and Casualty Co. Ltd., China	Aug 2020 - Sep 2021
Targeted Campaign	<ul style="list-style-type: none"> Conducted market research to determine product feasibility and summarized findings into reports Designed Campaign Opportunity Sizing Model for marketing managers to get real time sizing estimation of targeted customers base on various business criteria selections. Categorized candidate by household, industry and application types, which increased response rate and reduced the direct mail cost of over 20K 		
Analysis & Reporting	<ul style="list-style-type: none"> Built dynamic parameter driven financial models to predict yearly revenue & profit by insurance products Built templates with company's beneficial insurance products information by creating VBA/macros Created Trend analysis dashboard with 5 years' history of claim and settlement using Excel Created Monthly Financial Income Statements report and conducted cost analysis on claims based on insurance type in geographic breakdown to help sales team better attracting prospective region clients by 20% 		
Data Analyst, Client Consultant		New Oriental Vision Overseas Consulting Co Ltd., China	Nov 2017 - Jul 2020
Customer Data Management	<ul style="list-style-type: none"> Gathered requirements from sales team and office on site as well as finance department to improve the efficiency of the business processes and reduced cost by 25% Built a Microsoft Access database to integrate student and customer data that allow client to register, sign up for programs and track their application progress for over 2000 applicants yearly. Mapped and loaded data from diverse sources (Excel, Text files) into Access database; created process diagram using Windows Visio; Conducted data reconciliation and testing 		

EDUCATION

Bachelor of Management, Specialization in Finance | **Western University, London, ON** Sep 2011 - May 2015
 Diploma, Computerized & Legal Secretarial Studies | **Pius Culinary & Business Centre, Montreal, QC** Sep 2016 - Nov 2017
 Certificate: **Google Analytics - GOOGLE** - June 2022 | **SQL for Data Analysis - UDACITY** - Sep 2021