

QUALIFICATION

- **3 years** of experience in **Data Analysis, Process Automation & Business Intelligence** in **Banking, Investment, Retail**
- Advanced skills in **Excel** (vlookup, pivot table, index, match, Table Function), familiar with **VBA** automation
- Proficient in **EViews, Stata**; familiar with **Power BI**, Tableau, **SQL**, Python
- Experienced in **end-to-end data analysis**: cleansing, wrangling, visualization, modeling, interpretation
- Solid knowledge in **CRM** and **Credit Risk** (PD, LGD, EAD), familiar with RFM, BASEL III, IFRS
- Assignment hands on in **Corporate Finance**, FP&A, **Budgeting** and **Forecasting**
- Strong **Project Management** skills (BRD, SDLC, Agile, Waterfall), Experienced with Scrum, Sprint and Jira
- Strong motivation with an entrepreneurial thinking, **excellent communication skills with stakeholders**

EDUCATION

Master of Arts in Business Economics (Co-op), Wilfrid Laurier University | **GPA: A+**

Sep 2020 – Jun 2022

Honors Bachelor of Arts in Economics, Wilfrid Laurier University, Waterloo, ON

Sep 2016 - May 2020

WORK EXPERIENCE

Analyst (Intern) | Inossem Canada Inc.

May 2021 – Jan 2022

- Participated in **SAP** implementation for **Segway Inc.** and **Powersports Canada** as a **FICO** consultant; gathered requirements; conducted summarized pain points, and provided **solutions** with **best-practices**
- Cooperated with consultants from other modules such as **SAP SD** and **MM** to conduct integration tests, identify errors, potential issues in **business processes** and discover opportunities of **system improvements**
- Delivered documents including As-Is analysis, Blueprint, Functional specifications, Testing scripts and User manual
- Managed multi-parties' communication to facilitate project progress, organized weekly report meetings with customers to review CRs, incidents, and ad hoc requests based on **business requirement & user stories**
- Supported and conducted training sessions for end users, generated training documents, videos, and assessments
- Managed and implemented **system configuration** according to clients' business processes and setup **MDM**

CRM Analyst | ZheShang Fund Management Co., Ltd

May 2019 – Sep 2019

- Maintained **customer profile database** to ensure client information accuracy and up to date
- Analyzed sales performance by region, product, and time; conducted **trending** and **variance** analysis
- Prepared monthly **investor performance** reports with segments by financial products and investment strategies
- Conducted due diligence on potential targets; identified churn risks through **what-if** analysis
- Performed **market research** on various industries and companies to create **benchmarks**
- Created graphs and charts on a weekly market overview dashboard helping campaign plan and precision marketing

Sales Analyst | Oppein Home Group

May 2017 – Sep 2017

- Coordinated with **sales, marketing, operations, workforce** management and **finance** to improve process efficiency
- Assisted in developing weekly, monthly, and quarterly **sales plans, target** and **strategies**
- Analyzed **sales performance** based on **corporate** and 8 **subsidiaries** 'annual reports by branch, region, product
- Created and maintained 3-year **sales forecasts** and financial outlook reports
- Prepared sales and **marketing KPI** reports (average revenue per customer, average product price, sales funnel performance, impression, leads, and conversion analysis by channel)

DATA RESEARCH PROJECT

- CRM RFM – Customer segmentation analysis for Targeted Campaign Design | EDP Inc. Aug 2022
- Bell Case – Cash flow based Subscription Addition Strategy Selections | EDP Inc. Jul 2022
- Mark share Analysis – Big Buy Marketing Strategy | EDP Inc. Jul 2022
- SQL Adventure works on Customer Sales Transaction Analysis | EDP Inc. Jun 2022
- 10 years Data Analysis on the Effect of Teacher Quality on Children's Learning Apr 2022
- Data Analysis Project on Prediction of Housing Price Apr 2019

OTHER ACTIVITIES

- Teaching Assistant | Wilfrid Laurier University Jan – Sep 2021
- Cofounder and CEO | Textbook Finder Jan – Sep 2019
- Volunteer Leader - basic care of elders | John Noble Home, Brantford May – Sep 2016