Tom, Zhai He

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PROFILE SUMMARY

- Extensive experience in **Accounting**, **Financial Analytics**, hands on Marketing, CRM, Campaign & Risk Analysis;
- Exceptional knowledge in **Financial Modeling**, **Data Cleaning**, **reporting**, **Data Visualization** & **Process Automation**

SKILL SETS

- Programming Skills: **Advanced SQL**, **Excel, Access, VBA,** Azure Cloud SQL DB, Databricks, sparkSql, python, pyspark
- Business Intelligence: **Power BI, Tableau, Google Analytics,** Snowflake data Modeling, Forecast Modeling
- Other Tools: LucidChart, ServicesNow, Autosys, Jira, Confulence, draw.io

WORK EXPERIENCE

Data Analyst, EDPYPF Services Inc. Markham, ON　　　　　　　　　　　　　　　　　　　**Aug 2019 - Present**

- **Financial Modeling** and **Reporting**
  - Monthly Financial income statement report automation process design and development using access and excel, summarized 4 ways of predictive analysis of sales forecasting.
  - Finance & Accounting - Prepared and posted journal entries, supported month-end closure process and annual financial planning & analysis with excellent accounting and finance knowledge as well as attention to details
  - Automated process to upload invoices from excel to SQL Database using VBA, which reduced work effort by 4 hours
- **Data Visualization** Projects - Led requirement analysis for various industries including banking and retail, delivered market share and risk analysis using Power BI to gain insight and wrap up the POC to support sales activities.
- **Reporting Automation** Project - Identified major reporting process refinement opportunity by reducing campaign reporting preparation time by 30% via report automation, consolidation, and improved data gathering method
- **Customer behavior Analysis** - Conducted Customer Relationship Management analysis by creating models including RFM Model, Transaction Model and Cross-Shopping Model to provide key insights for redefining campaign implementation strategy.

Tools Used: PowerBI, Databricks, sparksql, pyspark, Azure SQL DB, Access, Excel, VBA, Python

Business Banking Intern, Bank of China　　　　　　　　　　　　　　　　　　　　　　　　　**Summer 2016**

- Effectively adjudicated & managed a daily pipeline of 50 loans to maintain service level agreements with internal stakeholders
- Delivered comprehensive quarterly portfolio performance reviews to executives, and conducted ad-hoc analysis and reconciliations on credit portfolios for monthly supervisory meetings.
- Developed solid understanding in lending products, credit risk measurements, and credit adjudication process;
- Facilitated external communication to clients in requesting additional information, following-up and providing consultation

Tools Used: Python, Power BI, Excel, VBA

COMPETITION PROJECT

Marketing Analyst, Marketing Strategy Design, Planning & Analysis　　　　　　　　　　　**Aug 2016 - Nov 2017**

Innovated unique technical product idea, a portable motion external battery charger with predictive product planning that fits the current market which will become a newly competitive product in the portable charger industry

- led a team of 5 and conducted a market research on product value proposition, customer segments, pricing strategy, promotion tools, distribution channels/partners and & activities
- Completed marketing strategy analysis on current market trend, environment & competitive strength; Delivered 3 reports and presented future expected revenue growth in the market based on statistical evidence and visualization
- Conducted effective financial plan based on revenue streams, cost structure, breakeven analysis, and cash budget and cash burn analysis, which has proved the feasibility of our product

Tools Used: Excel, Access, VBA

EDUCATION

Master of Management | Accounting & Finance, **University of Windsor**, ON　　　　　　**Sep 2015 - Aug 2019**
Bachelor of Arts / Economics**, University of Waterloo**, ON　　　　　　　　　　　　　　**Sep 2015 - Aug 2019**

CERTIFICATE

Advanced Google Analytics Certificate　　　　　　　　　　　　　　　　　　　　　　　　　　**2021**
CFA II certificate　　　　　　　　　　　　　　　　　　　　　　　　　　　　　　　　　　　**2019**