

Felix Jena, BS

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Professional Summary

Strategic finance and analytics professional with 7+ years of experience translating data into decisions across finance, operations, and systems. Proven ability to build scalable dashboards, automate reporting workflows, and deliver insights that drive clarity and action. Trusted by CFOs and COOs to lead cross-functional projects - from budget modeling and AR reconciliations to KPI tracking and grant compliance. Thrive at the intersection of finance, data, and strategy, with a mindset grounded in scalability, simplicity, and long-term value creation.

Skills

Tools & Analytics: Excel (PivotTables, VLOOKUP, dynamic modeling), Tableau, SQL, Google Suite (Docs, Sheets, Slides, Drive, Gmail, Gemini), Power BI, R, Python, Snowflake, QuickBooks.

Systems: NetSuite, Salesforce, EHR, Trello, MS Dynamics, ERP Systems, LMS Integrations, ETL Concepts.

Financial & Reporting: Forecasting, Budgeting, Modeling, KPI Dashboards, Variance Analysis, Data Governance.

Leadership & Strategy: FP&A, Cross-Functional Collaboration, Compliance, Change Management, Operations Optimization.

Professional Experience

Financial Analyst

Utah Partners for Health – Midvale, UT | Jan 2025 – Present

- Reconciled grant and bank accounts, prepared adjusting entries, and supported month-end close, streamlining financial workflows and reducing close timelines by 40% in collaboration with the CFO.
- Partnered directly with the CFO to implement budgeting frameworks and grant tracking tools that ensured HRSA/340B compliance and cut audit prep time by 30%.
- Collaborated cross-functionally with the COO and Department Heads to build custom Excel and Power BI dashboards tracking KPIs, driving faster, data-informed decisions across departments.
- Developed forecast models and automated board-facing reports that reduced manual reporting time by 40% while improving clarity and executive-level visibility.
- Led ad hoc analyses trends like patient attrition and dental program costs, uncovering over \$150K in funding optimization opportunities and informing strategic resource allocation.

Data Management Intern

Maverik Inc. – Salt Lake City, UT | May 2024 – Sep 2024

- Built a data inventory system across 15+ platforms, which cut retrieval time by 50% for internal auditors and supported compliance with SOX documentation.
- Developed ERP data flow visuals that clarified system dependencies, reducing time-to-insight for variance analysis and enabling quicker root-cause identification during monthly close cycles.
- Led stakeholder walkthroughs for data flow documentation, improving collaboration between IT and business units and reducing follow-up revisions.
- Translated complex system interactions into documentation adopted by IT and business teams, improving technical clarity.

Technology Specialist - Team Lead

Brigham Young University Idaho – Rexburg, ID | Sep 2022 – Dec 2024

- Oversaw digital platform setup across 200+ courses per semester, coordinating resources and timelines to ensure alignment with academic budgets.
- Led team-wide reporting initiatives, compiling performance metrics that informed departmental resource allocation and productivity targets.

- Designed Excel/Google sheets-based quality control tools that flagged data inconsistencies, reducing setup errors by 25% and improving service delivery timelines.
- Authored SOPs and workflow guides that reduced escalated tech support cases by 40% and standardized recurring semester startup operations.

Branch Manager – Financial Operations & Service Delivery

Capitec Bank – Pretoria, South Africa | Jan 2019 – Jul 2022

- Managed financial operations for a high-volume branch servicing 900+ clients weekly, overseeing sales projections and daily budget controls to meet transactional demands.
- Built and maintained weekly performance dashboards that guided branch reviews and contributed to a 15% increase in operational efficiency over 6 months.
- Led quarterly compliance audits across financial documentation and KYC records, maintaining 100% audit readiness and avoiding penalties.
- Implemented SLA metrics and workflow tracking that reduced customer complaint resolution time by 35%, resulting in a 28% decrease in repeat issues.
- Analyzed cost drivers and branch expense trends to inform regional forecasting efforts, identifying \$25K+ in annual process inefficiencies.

Senior Sales Consultant

Capitec Bank – Pretoria, South Africa | Oct 2017 – Jan 2019

- Analyzed client income and credit behavior to deliver data-driven lending solutions, contributing to a 22% increase in account acquisition over 12 months.
- Utilized CRM data to produce monthly sales and retention reports, influencing regional forecasting and exceeding quarterly targets by an average of 12%.
- Partnered with team leads to identify trends in customer drop-offs, adjusting marketing strategies and improving conversion rates by 18%.
- Standardized client onboarding documentation, improving reporting accuracy by 30% and reducing compliance exceptions during internal audits

Client Service Champion

Capitec Bank – Pretoria, South Africa | Jun 2017 - Oct 2017

- Audited 100-120 Know your Client (KYC) files weekly, contributing to a 15% reduction in turnaround time and faster onboarding of new clients.
- Supported risk management efforts by identifying and reporting 10+ recurring complaint patterns monthly, enabling faster product team resolutions.
- Delivered service performance reports that supported a 25% improvement in customer satisfaction ratings on internal scorecards within 3 months.

Education

Brigham Young University Idaho - Bachelor of Science (BS), Business Analytics

- Minor in Finance
- Business Fundamentals Certificate: Spreadsheet modeling, data visualization, financial analysis, process improvement.

Hobbies & Interests

- Soccer: Former semi-pro with Orchards United FC (2017–2022); now play recreationally.
- Karting: Competed in the Utah Motorsports A&D Go Kart Championship (2023 season).

Recommendations:



Utah Partners for Health
7651 S Main Street
Midvale, UT, 84047
(801) 417-0131 | upfh.org

To whom it may concern,

I had the pleasure of working with Felix at Utah Partners for Health, where he consistently demonstrated strong initiative and a collaborative spirit that made a tangible difference across multiple departments.

Felix built and maintained custom monthly dashboards for our department heads - including Medical, Dental, and Behavioral Health-that surfaced critical metrics like encounter volume, payor mix, no-shows, and cancellations. His work enabled faster, data-driven decision-making and gave our leaders the insights needed to steer their teams effectively.

Beyond his core responsibilities, Felix stepped up to support Pharmacy Finance with 340B reconciliation, QuickBooks matching, and month-end summaries-taking pressure off the Pharmacy Department and saving valuable time. He also created automated Excel scripts for our Billing Manager that flagged encounter errors and suggested corrections, dramatically reducing manual effort and improving accuracy.

Felix tackled ad hoc analyses for me personally, including patient attrition trends and profitability breakdowns of dental procedures, which were invaluable for strategic decisions and marketing efforts.

He brought curiosity, technical skills, and a mindset focused on making other teams more efficient. Any organization would benefit from his analytical abilities and proactive approach.

Best regards,
Ladd Larsen
Chief Operating Officer
Utah Partners for Health



Maverik, Inc.

185 South State Street, Suite 800
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801-936-5557 | maverik.com

To whom it may concern,

I had the pleasure of managing Felix Jena during the summer internship program at Maverik, Inc. He made a great first impression and I immediately knew he'd be a great fit for our Data Management internship. His analytical and financial coursework and working experience equipped him for the internship requirements of building data flow diagrams and a data inventory.

Felix worked with a variety of technical and non-technical team members to data map key Maverik systems. He created a framework for taking inventory of our sensitive data that we will be able to build upon to achieve a robust view of our data landscape. Felix was quick to understand technical jargon and interpret complex systems into logical data flow diagrams that Maverik will be able to use for years to come.

It was a pleasure working with Felix and I would recommend him for any role, especially one that requires the candidate to break down complex concepts, communicate clearly, and quickly learn new skills.

Carolyn O'Neill

Carolyn O'Neill
Manager, Data Management



Online Learning

To Whom It May Concern,

I am pleased to provide my highest recommendation for Felix Jena as he pursues opportunities in Financial Analyst, Data Analyst, or similar roles. I worked with Felix for two years at BYU-Idaho, where he served as a Team Coordinator under my supervision. During this time, Felix consistently demonstrated exceptional skills, professionalism, and dedication, making him an invaluable member of our team.

Felix excels in analyzing complex data and presenting actionable insights. He utilized tools like Power BI, Tableau, and Python to optimize our reporting processes, resulting in data-driven strategies that improved productivity. His attention to detail and ability to manage multifaceted tasks were key to our success in meeting deadlines and achieving team objectives.

In addition to his technical expertise, Felix is a natural leader. He fostered an inclusive, collaborative environment where team members felt valued and empowered. His enthusiasm and positivity inspired those around him, driving our team to perform at its best.

With international experience and a strong academic foundation in Business Analytics, Felix combines practical expertise and strategic thinking. His background includes roles such as Manager at Capitec Bank, further showcasing his ability to adapt and excel in diverse settings.

I am confident that Felix's analytical skills, leadership, and commitment to excellence will make him an asset to any organization. Please feel free to contact me at mooreco@byui.edu or (208) 496-1525 if you would like further information.

Sincerely,

Corey Moore