

# Jason Fung

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**Summary:** Analytics-minded professional with 5+ years of experience in financial technology. Proven track record of successful big data and project management contributing to improved reporting processes. Strong commitment to actionable intelligence, cross-functional collaboration, and excellent client service.

## EXPERIENCE

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**Product Engagement Specialist, ISS Market Intelligence, San Francisco, CA** **Apr 2018 – Present**

- Leverage retirement industry expertise to help clients achieve diverse business goals through ad hoc reports, competitive and trend analyses, opportunity target lists, and data-driven recommendations
- Promote skilled interaction with and ongoing engagement across multiple product platforms
- Develop key performance indicator dashboard illuminating customer usage and service activity metrics
- Broadly support sales and account managers in presale and renewal activities, respectively

**Project Manager, ISS Market Intelligence, San Diego, CA** **Apr 2017 – Mar 2018**

- Responsible for onboarding of new clients and related tasks, including creating project plans, conducting weekly progress meetings, coordinating technical resources, and resolving CRM integration issues
- Minimized lead time of deliverables through redesign of JIRA workflow and proactive communication
- Effectively managed user adoption and support of SaaS application, data feeds, and additional services

**Enterprise Data Analyst, ISS Market Intelligence, San Diego, CA** **Sep 2015 – Mar 2017**

- Oversaw data stewardship of defined contribution sales for 40 of 50 largest asset management firms
- Improved speed, consistency, and accuracy of standard reporting via query optimizations and templates
- Supervised analyst training while expanding libraries of procedural guides and product documentation

**Data Analyst, ISS Market Intelligence, San Diego, CA** **Mar 2015 – Aug 2015**

- Scripted comprehensive, daily-run health checks in SQL to monitor data quality across databases
- Increased referenceability of data sets by accurately linking 20,000+ disparate records to known entities
- Extracted key information on employee benefit plans from annual financial filings and audit reports

## EDUCATION

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**Data Analytics Boot Camp, UC Berkeley Extension, San Francisco, CA** **Jun 2020**

**Bachelor of Science in Management Science, Minor in Business, UC San Diego, La Jolla, CA** **Jun 2014**

## SKILLS & INTERESTS

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*Technical:* SQL, Python, HTML, JavaScript, Tableau, Microsoft Excel, Google Analytics, data stewardship

*Management:* Agile, Atlassian Jira and Confluence, Smartsheet, Salesforce, Microsoft PowerPoint, training

*Interests:* personal finance, ecological sustainability, hiking trails, travel, eclectic cooking, baseball