Jessie Lu

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QUALIFICATIONS:

- 5 years of experience in data processing, operational analytics, and reporting across diverse industries
- Practical experience with leveraging data to drive insights, building models for market performance assessment to deliver growth strategy, financial forecasting, gap analysis and business operations
- Profound knowledge in CRM (Salesforce) and ERP, track all sales activities, manage customer life cycle, determine high value potential customers and support system back-end business processes
- Hands-on experience with data acquisition, migration to staging environments, ETL to prepare analytic-ready datasets, statistic modelling, solution assessment and integration to decision support system
- Proficiency with complex SQL query, stored procedure for implementing business process and business logic, preform data conditioning, backend data verification for data integrity and consistency
- Advanced MS Excel skills in Vlookup, Pivot Tables, Array Formula, Data validation, Conditional formatting, revenue trend, forecasting model, Data Analysis ToolPak, solver for simulation and Regression
- Extensive experience in data visualization and dashboard design with Tableau and Power BI
- Detail-oriented, team player, fast learner, innovative, excellent analytical thinking and problem-solving skills

EXPERIENCES:

Business Intelligence Analyst, McGill University | mcgill.ca   2024.03 – Current

- ➢ Designed and implemented a new internal knowledge base on Confluence, migrating all team documentation from OneNote to a centralized platform, improving knowledge transfer and streamlining documentation practices
- Engaged with internal stakeholders to clarify analytical requirements, provide consultation, and drive issue resolution independently or collaboratively
- Designed and developed Tableau dashboards to communicate insights effectively and support data-driven decision-making, applying best practices to ensure clarity, consistency, and accessibility across reports
- Performed data integration and ETL processes using Alteryx and SQL to consolidate and transform data from multiple systems (Oracle, SQL Server)
- Maintained and troubleshot ETL workflows and Tableau dashboards to ensure data accuracy and reliable performance
- Administered Tableau Server, including user permissions, refresh scheduling, license management, user onboarding
- Coordinated and tracked ad-hoc data requests, ensuring timely delivery and high-quality BI outputs
- Documented budget-related operations, including workflows, dashboards, and data sources, to enhance process transparency and continuity

Data Analyst, McGill University | mcgill.ca   2022.05 – 2024.03

- ➢ Assumed and fully executed responsibilities of a 2-year vacant position within a condensed timeframe
- Designed and administered surveys with Qualtrics, Microsoft Forms and LimeSurvey, analyzed survey results to support the University's mission of teaching and research
- Maintained user group permissions, updated user group membership during on-boarding and offboarding employees
- Received and responded to requests for data in support of the Ingram School of Nursing's programs and accreditation requirements for internal and external partners
- Created reports and dashboards from multi data source (Data Warehouse, Banner, Crystal Reports/Minerva, Access database), proactively identified feasible report automation solutions
- Acted as a liaison between internal stakeholders and IT from application development to implementation. Translated business requirements into system design components. Participated in testing and reviewing design documentations to ensure requirements are met
- Provided training and guidance to internal clients on structuring and manipulating prepared data for operational needs

Sales Operations Analyst, DART Aerospace | dartaerospace.com   2021.01 – 2022.05

➢ Contributed to 50% time-savings on generating center weekly dashboard through migrating dashboard platform from offline Excel to dynamic Microsoft Power BI automation with SQL

- Engaged with sales leadership and cross-functional stakeholders to determine business objectives, construct business requirements, define project scope, setup schedule of deliverables, and evaluate criteria with KPIs/Metrics
- Acquired quantitative data from multi sources (CRM, ERP database) and migrated data with required file formats (fixed-width, comma-delimited) to staging environments
- Performed ETL on a multiple source dataset, cleaned errors, scrubbed duplicates, removed extra spaces, and eliminated all formatting to maintain data quality and consistency for business analysis
- Automated reports and dashboards with SQL and Power BI, generated Adhoc, periodic reports, weekly dashboard to support financial analysis, sales pipeline, KPI tracking and provided strategic recommendations
- Performed project closure activities in terms of End User training, KT session and project documentation
- Used Salesforce to report and track business opportunities and customer interaction, integrated with internal team communication, managed Salesforce data, supported all administration requests such as building workflow and fields

Business Analyst Intern, Actalent | actalentservices.com   2019.08 - 2020.06

- Produced financial forecast report using moving average and regression analysis to support budget operation decision
- Built DEA model by loading required data to Excel, generated model and solver, and produced summary report with the desired format for business performance assessment
- SQL/Tableau automation on dashboard generating and business processing, and scheduling periodic-report generation
- Supported all project management activities from project set-up, estimation, execution, review to closure

EDUCATION & PROFESSIONAL DEVELOPMENT:

Master of Information Studies, McGill university   2024.09 – Present
Google Data Analytics Professional Certificate   2021.12 – 2022.02
Salesforce Certified Administrator (SCA)   2021.01 – Present
UpstartED Youth Explore Program Facilitator (Volunteer)   2020.09 – 2021.12
SQL for data analysis, In-house training   2019.08 – 2019.12
Bachelor of Civil Engineering, McGill university   2015.09 – 2018.12