

Joey Musholt

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EXPERIENCE

Kemper Life, St. Louis, MO

2017 - 2022

Senior Financial Analyst, Sales Data Analytics Team

- Designed and executed process to build sales plan and revenue forecast models based on field projections, including dynamic sensitivity analyses based on key performance drivers
- Designed Tableau and Excel dashboards for executive users to measure impact of product repricing project on new sales and lapse rates
- Extracted, cleaned, and merged data using SQL from separate Snowflake databases to provide novel datasets used for insights into product performance
- Combined internal sales KPIs with census data and Maptitude mapping software to drive strategic decisions over expansion opportunities
- Lead database migration/modernization initiative, determining business materiality thresholds and coordinating and conducting UAT between business data users and IT partners

Financial Analyst

- Developed and maintained various managerial and financial schedules for regular operating reviews
- Optimized data structure of regular reports to extend functionality while improving performance
- Coordinated with FP&A teammates to provide novel and recurring reports to inform managerial decisions

Design Pickle, Scottsdale, AZ

2022 - 2023

Financial Analyst

- Lead monthly Budget vs Actual meetings, assisting business partners in understanding overall spend
- Automated data flows from company-wide ledger and plan systems to department-level performance reporting to enable data-driven decision-making
- Developed and maintained LTV:CAC reporting across subscription types to identify value sources

Magna5, Remote

2023 - present

Financial Analyst

- Designed and maintained DataRails dashboards for use in Sales organization
- Coordinated with functional leaders to create annual budget and 5-year forecast
- Transformed general ledger data into detailed recurring revenue reporting for churn analysis
- Implemented widespread incremental data governance improvements to drive efficiencies and improve data quality

Technologies

- Excel (advanced), Tableau, Snowflake, Workday, Adaptive, Salesforce, Maptitude, other MS Office
- SQL, VBA, Python, Google Apps Script

EDUCATION

Truman State University, Kirksville, MO

2013 - 2017

Bachelor of Science in Business Administration, Concentration Finance

Bachelor of Science in Accounting

Bachelor of Science in Economics