NICOLAS A. ROCHA

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BUSINESS DEVELOPMENT MANAGER

Highly skilled and experienced financial services, business development professional, and certified data scientist for business with a strong track record of successfully recruiting and building business relationships. A data-informed leader with a background in data science, machine learning, cloud computing, and institutional consulting experience. Recognized among team members as an individual that is an asset to any organization looking to grow and succeed. Fluent in English and Spanish with experience working for international organizations across multiple industries.

CORE COMPETENCIES

Leadership • Data Analysis • Recruiting • Relationship Building Techniques
Machine Learning • Time Series Forecasting • Business Acumen

HIGHLIGHTS

- Proven success in recruiting 50 new clients with Salesforce, generating $1B in sales, contributing to record growth, and developing data-oriented projects and reports during the pandemic that helped 850+ clients navigate the crisis.

PROFESSIONAL WEBSITE & DATA SCIENCE PORTFOLIO

https://nrocha-datasciencebd.netlify.app/

Time Series Forecasting Application (R, Shiny)
Developed a sales forecasting dashboard for various industries using R Shiny, Tidyverse, and Timetk. Researched industry players in Energy, Construction, Telecommunications, and Oil & Gas and analyzed product pricing and usage data. The project showcases advanced data analysis and visualization skills.

Pricing Recommendation Application (R, Shiny)
Created an R Shiny app for wire and cable manufacturers to price products accurately using machine learning. The app predicts costs based on researched user inputs, demonstrating machine learning, regression modeling, and web app development expertise.

EXPERIENCE

AFFILIATED DISTRIBUTORS, Philadelphia, PA   **7/2019-10/2022**
Business Development Analyst

Improved the business development recruiting process by leveraging Salesforce, resulting in 50 new client acquisitions and $1B in sales growth.

- Demonstrated expertise in data analysis as part of the frontline business intelligence team, delivering insightful reports to 850+ clients with $60B in sales in North America and contributing to the company's success during challenging times.
- Displayed strong marketing and competitive intelligence skills by participating in a competitive leadership development program, resulting in the creation of effective collateral marketing materials and a 20% increase in new clients.

WASMER SCHROEDER, a portfolio management service of Charles Schwab, Philadelphia, PA   **8/2015-6/2019**
Business Development Associate / Associate Director of Business Development

- Built and sustained business in the Mid-Atlantic region for a Separately Managed Account (SMA) Fixed Income Manager, resulting in a $150M increase in AUM.
- Boosted the firm's presence and differentiation at conferences and symposiums through over 50 successful office visits and effective representation.
- Developed a new framework for the Relationship Management and Client Services teams by tracking advisor feedback in Microsoft Dynamics to identify trends and best practices and anticipate future needs.

FORTIGENT, LLC, an HNW platform of LPL Financial, Rockville, MD **1/2013-7/2015**
Associate Wealth Consultant / Associate Analyst, Research

- Strengthened partnerships with Institutional and RIA clients as the primary point of contact, leveraging strong interpersonal skills to build effective relationships with internal and external stakeholders.
- Improved advisor satisfaction and cemented relationships through a comprehensive approach, including training sessions, online portal demonstrations, implementation of customer feedback into software updates, and regular communication.

CONVERGENT WEALTH ADVISORS, Potomac, MD **3/2011-1/2013**
Performance Reporting Analyst

- Maintained and updated institutional reports with $500M in assets and private equity reports with $600M, ensuring 100% timeliness for four consecutive quarters and increasing efficiency.
- Earned recognition twice as an employee who embodies the firm's core value of teamwork.

GRAYSTONE CONSULTING, an institutional consulting business of Morgan Stanley, Washington, D.C. **6/2008-3/2011**
Institutional Consulting Analyst

- Worked on an Institutional Consulting Team managing $12B in AUM.
- Analyzed quarterly investment performance returns for institutions, endowments, and high-net-worth individuals, providing accurate and up-to-date performance data.
- Developed and presented portfolio allocation proposals and pitchbooks to HNW and Institutional clients, demonstrating investment strategy and analysis expertise.

EDUCATION

Bachelor of Business Administration (BBA), Finance, Marymount University, Arlington, VA

Certified Data Scientist for Business (Five-Course R track program), Business Science University, Philadelphia, PA

CERTIFICATIONS

Business Science University, Philadelphia, PA
Certified Data Scientist for Business

- **Data Science for Business Part 1 - Business Analysis with R**
  - Data Cleaning & Manipulation, Visualization, Data Science Algorithms & Iterations, and Business Reporting
- **Data Science for Business Part 2**
- **High-Performance Time Series**
  - Time Series Forecasting, Business Consulting, and Advanced Machine Learning
- **Shiny Web Applications Part 1**
- **Shiny Web Applications Part 2**
  - Web Apps & Dashboards
  - Full Stack Development & Deployment

Kellogg Executive Education, Philadelphia, PA
Mastering Sales: A Toolkit for Success

TECHNICAL SKILLS

CRM & Reporting: Salesforce.com, MS Office Suite
Programming & Data Science: R & Shiny (Tidyverse), Time Series Forecasting, Customer Segmentation, Churn and Attrition Prediction, H2O Automatic Machine Learning & Tidymodels
Database Management: SQL
Cloud & Version Control: AWS & Cloud, Git & Docker