

PHOEBE YUEH, CFA, FRM

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Highlights of Qualifications

- Expertise in data cleaning, extraction, and manipulation using SQL, Python, SAS, and R.
- 3+ years of data storytelling experience with compelling visualizations and dynamic dashboards in PowerBI and Tableau
- Proficiency in predictive modelling (Regression, Clustering, Neural Networks, etc.) on large datasets
- Familiarity with cloud infrastructure (AWS, Google Cloud Platform, Azure, etc.)
- Solid understanding of banking products and customer engagement strategies in Retail & Small Business
- Effective communicator and team player adept at bridging the gap between technical and non-technical stakeholders

Experience

Scotiabank

Toronto, ON

Manager, Portfolio Analytics

Jun 2022 - Current

- Product Owner of the No.1 Power BI dashboard across a total of 7000+ reports within the bank
- Designed and maintained an internal portfolio management platform for Small Business, serving 1000+ users nationwide
- Successfully increased the platform's monthly views/usage from 60K to 160K+ within 12 months
- Automated 5+ critical dataflows by leveraging SQL server data extraction and Power Query transformations in PowerBI Services
- Conducted 20+ virtual and in-branch demos and presentations on platform updates, collecting user feedback actively to enhance user experience on a regular basis
- Contributed to the strategic customer segmentation initiative by categorizing customers based on their value and growth potential; played a key role in supporting branch advisors with assigning new customers to appropriate segments, facilitating targeted service delivery and relationship management

Senior Technical Business Analyst

Sep 2021 – Jun 2022

- Oversaw the management of 200+ Tableau reports for Global Risk Management department across multiple market risk classes
- Upgraded the Tableau Server with minimal downtime, introducing new features to non-technical stakeholders and improving overall system stability
- Engineered a dynamic dashboard that tracks data job completion, providing precise estimation of report delivery timelines and achieving a 20% improvement in efficiency for managers in global offices
- Adept at utilizing Jira for efficient project management, facilitating seamless communication, task tracking, and sprint planning within an Agile and Scrum framework

RESL (Real Estate Secured Lending) MIS & Analytics Intern

Jan 2021 – Apr 2021

- Implemented an Excel VBA automation solution to optimize the tracking of mortgage portfolio flows for senior management, enhancing operational efficiency within the Real Estate Secured Lending team

British Columbia Investments

Victoria, BC

Corporate & Investor Relations Intern

Sep 2020 – Dec 2020

- Led the development of the Climate Change Toolkit, a comprehensive tool addressing climate change and educating pension clients on BCI's integration of long-term ESG matters into investment decisions
- Managed 20+ tasks in BCI's Customer Relationship Management software Satuit and further utilized its dashboard functionality to analyze webcast attendance data for 10+ Speaker Series, improving attendance rate by 8% in educational offerings

Education

University of California, Berkeley – Master of Information and Data Science (Part-Time)

May 2025 (anticipated)

University of Toronto – Bachelor of Business Administration (Co-op), with Distinction

Nov 2021

Certificates

- Professional Scrum Product Owner II (PSPO II), 2024
- CFA® Charterholder, 2023
- Microsoft Certified: Azure AI Fundamentals, 2023
- Microsoft Certified: PowerBI Data Analyst Associate, 2022
- Certified FRM (Financial Risk Manager), GARP, 2022
- Tableau Desktop Specialist Certificate, 2022
- SAS Base and Advanced Programming Certificates, 2021