



VELPULA VENKATESH

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Managerial Assignments

Financial Analysis and Research ~ Investment Banking ~ Business Intelligence

Expertise in analyzing data and presenting actionable information to help make informed business decisions

CAREER SUMMARY

- MBA with rich experience of **nearly 8 years** of experience in **Financial Management & Research and MIS Analysis**
- Possess **4 years** of experience in **IT Business Intelligence and Analysis Data Visualization tool like Tableau Desktop and Tableau Server**
- **Currently working as a Senior Tableau Developer**
- Analyzed and validated the data and delivered correct information regarding Pricing and Secondary market, Corporate Action like redemptions, Default, Bankruptcy and Tender by contacting Issuer, Underwriter and Trustee
- IT industry experience in Retail, Banking and Financial Industries.
- Developed and supported enterprise BI solutions for the different business verticals.
- Proven talent in managing client specific research assignments to track trends for all major sectors/ industry as well as evaluating new business initiatives/ projects from a feasibility, risk & regulatory framework
- Skilled in **developing and executing Business Analytics & Intelligence Strategy**, with the goal of converting data and information into actionable insights that drive profitable growth
- Credited for checking and maintaining the quality of data consistency across sources with respect to credit facilities, bonds, loan facilities, and other credit instruments
- Skilled in liaising with business stakeholders to identify continuous process improvement initiatives
- **Certified LEAN Facilitator** – suggested areas of process improvement with huge backlog of files to clear; saved several working units and smooth workflow
- Possess sound interpersonal, communication and organizational skills with capabilities in team management and stakeholder relationship management
- Hands on experience on Azure Data Factory V2

CORE COMPETENCIES

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| ➤ Research Operations | Financial Analysis | Business Intelligence/ Insights |
| ➤ Data Mining / Management | Capital Market Operations | Lean / Process Management |
| ➤ MIS Management | Account Receivable and Payable | Bank Reconciliation |
| ➤ Stakeholder Management | Client Relationship | Team Management |
| ➤ Data Validation | Data Visualization | Tableau Server/Desktop |
| ➤ Microsoft Azure | | |

PROFESSIONAL WORK EXPERIENCE

- Worked as a Tableau Developer for TCS from Sep 2021 to Sep 2022 with Team ware Solutions Payroll
- Worked as a Reporting analyst for S&P Global from May 2017 to Feb 2021
- Worked as a MIS Reporting analyst for Jye Health Systems from Dec 2013 to Dec 2016

Major Projects Worked On

Client : **BJ'S Wholesale club**
Environment : Tableau Desktop, Server and SQL
Team Size : 6

Project Description:

The solution involves in creating dashboards and work sheets that depict different levels and stages. Work sheets consists Promotions, clubs and product wise, Year, Quarter, month and week wise transactions report. And dashboard to give quick overview of the categories, sub categories, Articles, and their overview among different POG Locations

Responsibilities:

- Understanding business requirement and plan solution to address data needs.
- Working on Assigned Report/Task.
- Creating Technical Documentations/Mapping Document.
- Discussing any issues/bottle necks identified during development in these stand-up calls.
- Building, publishing customized interactive reports and dashboards, report scheduling using Tableau server.
- Created action filters, parameters and calculated sets for preparing dashboards and worksheets in Tableau.
- Developed Tableau workbooks to perform year over year, quarter over quarter, YTD, QTD and MTD type of analysis.
- Developed Tableau visualizations and dashboards using Tableau Desktop.
- Developed Tableau workbooks from multiple data sources using Data Blending.
- Generated Dashboards with Quick filters, Parameters and sets to handle views more efficiently.
- Generated data source filters while handling huge volume of data.
- Published Workbooks by creating user filters so that only appropriate teams can view it.
- Coordinating with Tableau Admin Team for Production Deployment.
- Fixing defects raised in PROD during initial support.
- Report Migration form DEV->QA->PROD.
- Updating Tickets/Tasks as when completed.
- Test and publish dashboards and reports and schedule refresh.
- Solving any data or performance issues related to workbooks and data sources.
- Monitoring reports and dashboards and make necessary changes.
- Managed client relations and resolved issues as quickly as possible.
- Maintained professional and productive relationships with clients.

Client : **Walmart Inc**
Environment : Tableau Desktop, Cognos and Big query
Team Size : 5

Project Description:

The solution involves in creating dashboards and work sheets that depict different levels and stages. The BI Solution comprises of 5 major Dashboards; Categorical analysis inclusive of Articles and Promotions, Percentages and Differences, Ranking, Geographical Distribution of Sales and Forecasting. Last year and this year sales comparisons. Migrating reports Cognos to Tableau. Respective Stories have been added to give quick information about mile stones.

Responsibilities:

- Meet with clients or management to understand data migration requirements and needs.
- Strategize and plan an entire project, including moving the data and converting content as necessary, while considering risks and potential impacts
- Oversee the direct migration of data, which may require minor adjustments.
- Test the new system after the migration process as well as the resulting data to find errors.
- Document everything from the strategies used to the exact migration processes put in place—including documenting any fixes or adjustments made
- Develop and propose data migration best practices for all current and future projects.
- Ensure compliance with regulatory requirements and guidelines for all migrated data.
- Developing Workbooks and Extracts on Tableau Desktop.
- Refreshing Extracts on Development and QA site.
- Monitoring the status of extract schedules on QA site.
- Performing Unit Testing on Development and QA sites.
- Resolving any data or performance issues related to workbooks and data sources.
- Follow up Managers for any required approvals.

Client : **Commonwealth Bank of Australia**
Environment : Tableau Desktop SQL developer
Team Size : 4

Project Description:

The solution involves in creating dashboards and work sheets that depict different levels and stages. Work sheets consists region and product wise, month and week wise transactions report. And dashboard to give quick overview of the categories and their overview among different geographical areas

Responsibilities: Played an important role in the project for creating client pleasing visualizations, my responsibilities as below

- Creating Parameters and Calculated Fields
- Conducting unit testing to cross- verify the requirement
- Creating Hierarchies, Groups and Sets (Constant and Calculated)
- Working on TOP N/Bottom N Sets
- Working on Visualizations to meet client requirements by using Tableau's built-in charts such as Packed Bubble, Scatterplot, Gantt, Bullet-graphs, Box-and-whisker plot, Dual Axis, Stacked-bars Charts etc.
- Creating Table Calculations and Level of Detail (LOD) Expressions
- Creating Interactive and efficient Dashboards with Action Filters for Dashboards.
- Publishing Dashboards to Tableau server.
- Scheduling Dashboards in Tableau Server.

Client : **S&P Ratings**
Environment : Tableau Desktop and SQL Server
Team Size : 10

Project Description: The solution involves in creating dashboards and stories that depict different levels and stages. The very first is a managerial dashboard to give quick overview of the Categories and their overview among different geographical areas, trends and comparisons using Map Charts, Pies, Stacked Bars, Scatter Plots etc. The second one concentrates more on slicing and dicing the inventory and sales data using Dual Axis Charts, Various line charts, Waterfall charts etc. The last one is a blend of Calculated Fields, Table Calculations and a bit of LODs to answer different types of the requirements of the client.

Role: Played an important role in the project for creating client pleasing visuals and Dashboards along with stores, participated in Brain-storming sessions and coined innovative ideas and solved complex business issues.

Client : **S&P Platts**
Environment : Tableau Desktop and SQL Server

Project Description: This innovative solution is to provide the organization to get deep insight and quick analysis regarding Sales, Profit, Inventory, Market Trends, Geographical representation of Sales, Profit Margin, Ranking of Products, Sales Persons, Differences and Percentages among Key Regions in each Segment, Category and Product and many more. The BI Solution comprises of 5 major Dashboards; Categorical analysis inclusive of Segments and Products, Percentages and Differences, Ranking, Geographical Distribution of Sales and Forecasting. Respective Stories have been added to give quick information about mile stones.

Role: Played key role in the project i.e., involved in all stages of the project such as loading data, basic transformation, visualizations, Calculated Fields and Parameters, Dashboards and Stories.

Client : **S&P Global**
Environment : Tableau Desktop

Project Description:

This BI-solution was developed in order to facilitate the top-level management to interact with different visualizations that include Manufacturing Units, Productivity, Products, QC, Sales Agents, Distributors and dealers, Sales, Comparisons, Regional Trends, After Sales Services, Leased Vehicles and Maintenance etc. Custom shapes prescribed by the client were using while creating KPI's. Numerous calculated fields and parameters were created and used in visualizations. Apart from regular charts, custom charts were used in this project.

The project contained various Dashboards such as Inventory, Manufacturing Analysis, Shipping, Quality Analysis, Regional Sales, Product Analysis, Customer Analysis etc.

IT SKILLS

- **Business Intelligence Tools:** Tableau Desktop, Tableau Server
- **Database:** MSSQL
- **Programming Languages:** VBA
- **Other:** Microsoft Office (Advanced in Excel, PPT), Microsoft Azure

PERSONAL DETAILS

Name : Velpula Venkatesh
Date of Birth : 29/12/1989
Marital Status : Married
Language Known : English, Hindi and Telugu.