

Automation Wins — SCGCPA

I replace manual Excel/PowerPoint reporting with self-service Power BI systems. CPA with 10 years across accounting, audit/tax, and banking analytics. Tools: Power BI, Power Query (M), DAX, SQL, Python (Pandas/NumPy).

Key Outcomes

- **Monthly risk pack → Power BI (SQL + DAX) — ~75% faster cycle**; eliminated manual copy-paste and reconciliation churn; governed data model with role-based views.
- **Weekly & monthly assessments automation — ~90% fewer manual hours** across multiple LOBs using Python + Power Query; standardized templates; audit-ready outputs and scheduled refresh.
- **RCSA / Issue Management dashboards** — Real-time visibility of issues, corrective actions, and controls; replaced ad-hoc extracts; standardized measures and improved stakeholder transparency.

Selected Capabilities

- | | |
|--|---|
| • Power BI data modeling (star schema) | • Row-level security (RLS) & governance |
| • DAX measure design & validation | • Scheduled refresh & subscriptions |
| • Power Query (M) shaping & parameters | • Python (Pandas) pre-processing |
| • SQL (views, joins, CTEs) | • Standardized KPI logic / taxonomy |

Tools: Power BI • Power Query (M) • DAX • SQL • Python (Pandas/NumPy) • VBA • Advanced Excel • ETL • SSMS • SSIS (basic)

Note: All examples are anonymized and use synthetic data. This one-pager is intended to illustrate approach and typical outcomes.