



# **SUPPLY CHAIN BUSINESS DATA ANALYST**

Panel Presentation

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2015

**PRINCETON**

Economics A.B.  
Quantitative Analysis  
Academic Excellence



2016-2018

**FINANCE**

Proprietary Trading  
Derivatives Analysis  
Client Operations

2022-2023

**101ST AIRBORNE**

Led 42 Soldiers  
\$2.8M Equipment  
100% Readiness



2024-NOW

**POINT72**

Healthcare Analysis  
AI Integration (40% ↓)  
\$35B AUM

**NEXT STEP****APEX**

Supply Chain  
Space Manufacturing  
System Building

**KEY ACHIEVEMENTS & EXPERTISE****F FINANCIAL & ANALYTICAL**

- Research for 16 PMs managing multi-billion dollar portfolios at \$35B hedge fund
- Led AI integration reducing analysis time by 40% while enhancing quality
- Managed \$500K daily risk positions in proprietary trading
- Resolved complex derivative valuation disputes (TriOptima/NEX)

**M MILITARY & LEADERSHIP**

- Ranger Tab, Expert Infantry Badge, Air Assault qualified
- Led 42-soldier platoon through 5 major field exercises
- 100% equipment accountability (\$2.8M) during NATO deployment prep
- Active Secret clearance (U.S. Army Reserve Command)

**TECHNICAL PROJECT HIGHLIGHTS****1 HandReceipt**

Digital property accountability with cryptographic audit trail

**2 PTChampion**

AI fitness assessment using computer vision

**3 GridMate**

AI Excel assistant reducing modeling time by 70%

**MISSION FOCUS**

101st Airborne veteran → National defense → Space sector

**CAREER DRIVE**

Ready to build systems, not just analyze them



2-506 IN, 101st Airborne Division  
Fort Campbell, KY • 2018-2021

#### KEY METRICS

**100%**  
Accountability

**95%**  
FMC Rate

**\$10M+**  
Equipment Value

**140**  
Soldiers

#### LEADERSHIP EXPERIENCE

##### PLATOON LEADER

Oct 2018 - Mar 2020

- Led 42 soldiers in tactical operations
- Managed property accountability & sensitive items
- Coordinated LOGPAC & field resupply operations
- Maintained 95% equipment readiness rate

##### COMPANY XO

Apr 2020 - Dec 2021

- Second-in-command for 140 soldiers
- Chief administrative & logistics officer
- Managed \$10M+ equipment via ERP systems
- Led battalion deployment coordination

#### SUPPLY CHAIN & LOGISTICS

##### Property & Inventory

- Hand receipts & sub-hand receipts
- Monthly sensitive item inventories
- FLIPL investigations
- Change of command inventories

##### Systems & Operations

- 100+ daily requisitions
- ERP administration
- EDI transaction management
- USR readiness reporting

**Key Achievement:** Zero findings on command inventories • NATO deployment certified •  
Highest readiness rates in battalion

**SAP-BASED**

Unit-level ERP for supply, maintenance, and property accountability

**DAILY WORKFLOW**

Requisitions 60%      Property 25%      Maint 15%

**CORE WORKFLOWS****REQUISITIONS**

Review overnight status → Triage rejections → Validate NSNs → Track 50-200 open → Emergency auth

**PROPERTY**

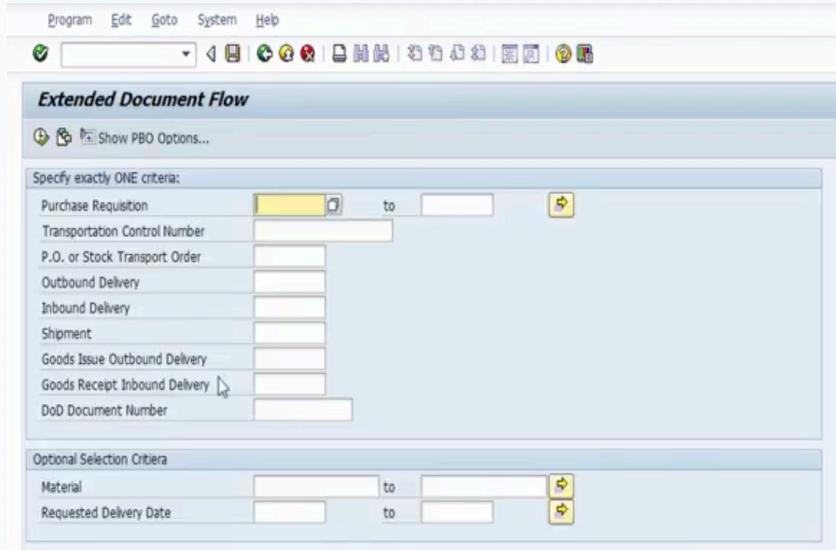
Hand receipts → Monthly inventories → Lateral transfers → Turn-ins to DRMO

**MAINTENANCE**

Monitor deadlines → 95% FMC target → Link parts to WOs → ASL review

**EDI FLOW**

850 Purchase Orders → 856 Ship Notices → 870 Status Updates → Daily batch sync

**⚠ CRITICAL GUARDRAILS****DAILY INTERFACE****Daily Volume:**

**100+** Requisitions **50+** Inventories

**20+** Work Orders **200+** EDI Trans

## // DEPLOYMENT READINESS

2-506 IN • 3BCT • 101st

Operation Atlantic Resolve

S-3 Shop Lead

**~90 days**  
notice to deploy

**4 of 5**  
BN leaders brand-new

**100%**  
accountability at rail load

**1 Situation**

Short-notice deployment to Europe with ~90 days to prepare. BN leadership turnover (4 of 5 new). No trusted visibility on vehicles/equipment status, rail/port timelines. Destination shift Romania → Grafenwöhr mid-planning.

**AGWASH Critical Path:** Agricultural wash & inspection before international shipment.  
Failure = customs holds, re-wash, missed rail windows.

**2 My Actions (S-3 Operations)****Single Source of Truth:**

- Reconciled GCSS-Army with motor-pool ground truth
- Built daily RAG dashboard: FMC/NMC, WOs, parts ETAs
- Tracked AGWASH queue/throughput, railcar assignments

**AGWASH Operations:**

- Established cell (hours, SOP, QC checklist)
- Sequenced 180+ vehicles through inspection
- Coordinated lateral part transfers for red vehicles

**Movement Coordination:**

- Built rail load plan with ITO/SDDC sync
- Re-cut movement when destination changed
- 15-min daily stand-ups with BN XO/S-3/maintenance

**Outcomes**

Zero missed rail windows

100% FMC at departure

Clean AGWASH inspections

All items reconciled

**Impact:** Tracker + SOP adopted as BN template for all follow-on deployments

**MOVEMENT TIMELINE**

- D-90 Alert - Pull GCSS lists
- D-70 AGWASH - SOP created
- D-45 RAG Live - Daily stand-ups
- D-21 Rail Plan - Load locked
- D-0 Success - 100% FMC



HEMTT

**DAILY RAG SNAPSHOT**

Vehicle	Status	Work Order	Part ETA	AGWASH
M1151-A3-021	FMC	—	—	Pass
LMTV-M1078-114	NMC	WO-2317	+2 days	Pass
M1151-A3-037	NMC	WO-2294	Back-order	Queued
HET-M1070-006	FMC	—	—	Pass

**EXECUTION CHECKPOINTS**

## // RESEARCH ANALYST @ POINT72

**CORE RESPONSIBILITIES**

- Centralized division **distributing reports to all PMs** across 4 sector teams
- Own subsector coverage (Healthcare focus) with ~15 **expert calls per report**
- Track KPI deltas vs. expectations; highlight **surprises** and business drivers
- Translate KPI moves into **revenue/margin implications** for public tickers
- Write and optimize **SQL** across internal & vendor databases
- Publish decision-ready memos, charts, and scorecards to PM distribution

**OUTPUT CADENCE**

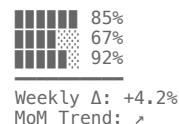
Weekly trackers + deep-dive reports in house style

**SKILLS & TOOLS DEVELOPED**

- Expert-call interviewing & note synthesis
- Prompt engineering & LLM-assisted summarization
- Data modeling, joins, and QA
- Visualization & narrative framing
- Stakeholder management across PMs
- Compliance-aware research practices

**REPRESENTATIVE OUTPUTS****REPORT TYPE**  
**House-Style Report**

- Executive Summary  
KPI Analysis  
Recommendations

**DASHBOARD**  
**KPI Tracker****TECHNICAL DOC**  
**SQL Lineage Map****SUPPLY CHAIN ANALYTICS FOCUS****Healthcare Sector**

Medical device supply chains, hospital purchasing patterns, distributor networks, inventory management

**Data Infrastructure**

SQL optimization, lineage tracking, QA automation

**Trading Impact**

KPI-to-revenue translation, margin analysis, risk flags

## // POINT72 AI INITIATIVE

## ORIGIN STORY

Analysts drowning in manual synthesis. I led AI automation initiative — started Healthcare, scaled division-wide.

## CHALLENGE

- Manual aggregation across expert calls, earnings transcripts, and SEC filings
- Bottlenecks from draft formatting + QA
- Inconsistent output quality and style
- Delayed PM feedback loops

## WHAT I BUILT

- LangChain-based synthesis tool routing to frontier LLMs
- Ingest of call notes, earnings calls, and SEC (10-K/10-Q/8-K/proxies)
- **Inline citations with source traceability (prevents hallucinations)**
- Template-constrained "house-style" drafts
- Automated packaging & distribution to PMs
- Metadata/lineage tracking for compliance
- Human-in-the-loop review gates

## IMPACT

40%

Time Saved

16 → All

PMs Scaled

Faster

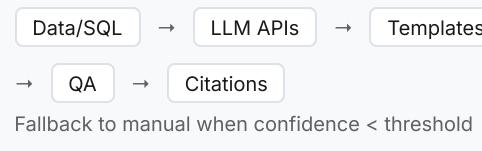
PM Feedback

## IMPLEMENTATION ARCHITECTURE

## WORKFLOW TRANSFORMATION



## SYSTEM PIPELINE



## P72 INITIATIVE DETAILS

## TECH STACK

LangChain
SQL
LLM APIs
Python

## GOVERNANCE &amp; SCALE

- ✓ Confidentiality controls & prompt hygiene
- ✓ Evaluation sets for accuracy/style
- ✓ Human-in-the-loop review gates
- ✓ Started with 16 Healthcare PMs
- ✓ Scaled to full US research division
- ✓ Template for other automation initiatives

## GRIDMATE

## PARALLEL INITIATIVE

Complementary Excel automation tool I built for financial modeling workflows.

- Natural-language formula generation
- Office.js add-in + streaming LLM
- Change previews & audit trail

70% Time Reduction

## // HANDRECEIPT – COMPANY-LEVEL ERP

## ORIGIN STORY

This was the first product I built while separating from the Army. It came from daily frustration: property accountability at the company level and below was still *paper-based*, with DA Form 2062s and sub-hand receipts creating blind spots between the company property book and individual soldiers. I set out to digitize that layer.

## THE PROBLEM

- Sub-hand receipts tracked on paper (DA 2062) with no reliable digital trail
- Gaps between GCSS-Army property book and individual responsibility
- Time-consuming audits; difficult chain-of-custody and change history

## WHAT I BUILT

## // Core capabilities

- OCR/LLM digitization of DA Form 2062
- Digital twin with sub-hand-receipt linkage
- Immutable audit log using ImmuDB
- Web + iOS + Android apps
- QR code item lookup & transfers

## PAPER → DIGITAL TRANSFORMATION PIPELINE



- Human-in-the-loop review on low-confidence parses
- Every issuance/turn-in writes a **signed, append-only record**

## STATUS &amp; LESSONS

- Built post-Army as a practical fix for sub-hand-receipt visibility
- Focused on accuracy, auditability, and ease for supply sergeants
- Kept claims conservative: this slide intentionally removes ROI/adoption numbers

## WHY IT MATTERS FOR APEX

- Pattern: paper→digital + immutable lineage
- Direct analog to component custody tracking
- Built ERP from zero with strong governance

## FRONTEND

React PWA  
SwiftUI • Kotlin

## BACKEND

Go/Gin REST API  
PostgreSQL

## DATA/AI

ImmuDB • LLM APIs  
OCR Pipeline

## // READY TO CONTRIBUTE

My experience across military logistics and financial analytics has prepared me to help Apex scale.

I'm excited about the opportunity to apply these skills to spacecraft manufacturing.

## DIRECT EXPERIENCE → APEX REQUIREMENTS ALIGNMENT

## MY PROVEN EXPERIENCE

End-to-end ERP execution  
GCSS-Army daily + HandReceipt build

EDI transaction management  
850/856/870 daily processing

Inventory accuracy systems  
100% accountability achieved

Supply chain analytics  
SQL, KPIs, vendor analysis

Process automation  
40% efficiency improvement

Shop floor support  
Daily stand-ups, training teams

## YOUR REQUIREMENTS

✓ ERP/MRP launch track record

✓ EDI development & monitoring

✓ Drive inventory accuracy

✓ Data-driven reporting

✓ System integrations

✓ Train team on systems

## UNIQUE VALUE I BRING:

- Built ERP from scratch with paper→digital transformation (directly applicable to spacecraft component tracking)
- Scaled automation patterns across organizations (automate → standardize → govern)
- Battle-tested under real constraints (deployment deadlines, zero-defect requirements)



MISSION-DRIVEN



BUILDER AT HEART



GROWTH MINDSET

## THANK YOU

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