

Karthik Gudi

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SUMMARY

Financial Analyst with 5+ years of experience in IT services, consulting, SaaS, and technology finance, specializing in FP&A, financial modeling, budgeting, forecasting, and audit compliance. Skilled in leveraging SQL, Python, Excel (VBA/Macros), Tableau, and Power BI to automate reporting, optimize financial processes, and deliver data-driven insights that improve decision-making and cost efficiency. Proven track record in managing ₹4,000+ Cr portfolios, SaaS/cloud costing, CapEx/OpEx optimization, and revenue recognition while ensuring GAAP and SOX compliance. Adept at partnering with cross-functional teams to align financial strategies, risk management, and business growth objectives, driving measurable impact in global organizations.

EDUCATION

Master of Science in Business Analytics | **Sacred Heart University, Fairfield, CT**

Dec 2024

SKILLS

CRM & Salesforce Ecosystem: Salesforce Sales Cloud, Service Cloud, Experience Cloud, Salesforce Lightning, Salesforce AppExchange

Tech Skills: Python, Advanced SQL, Advanced Excel, R Studio, Jira, Confluence, Lucidchart, SAP, A/B Testing, Agile methodologies, BI Tools (Looker, Tableau, Power BI), HTML5, CSS, SAS, Salesforce, Visio, SDLC, Alteryx, Waterfall, Microsoft Office 365.

Financial Analysis & Reporting: Financial Modeling, FP&A (Financial Planning & Analysis), Budgeting & Forecasting, Variance Analysis, Cost-Benefit Analysis, Revenue Recognition, Cash Flow Analysis, P&L Management, Audit Readiness, Risk Management, GAAP & SOX Compliance

Tools & Technologies: Microsoft Excel (Power Query, Pivot Tables, VBA, Macros), SQL, Python (Pandas, NumPy), Tableau, Power BI, SAP, Oracle Financials, QuickBooks, Workday, Hyperion, Advanced Excel Automation

Data Analysis & Automation: Data Wrangling, Data Visualization, KPI Tracking, Financial Reconciliations, Reporting Automation, ETL (Extract, Transform, Load), Scenario Analysis, Sensitivity Analysis

Domain Expertise: IT Services & Consulting Finance, SaaS & Cloud Costing, Capital Expenditure (CapEx) & Operating Expenditure (OpEx), Investment Analysis, Portfolio Management, Cost Allocation, Asset Capitalization, Procurement Optimization

Business & Strategic Skills: ROI Analysis, Pricing Strategy, Customer Acquisition Cost (CAC) Analysis, Financial Risk Assessment, Contract Management, Compliance & Governance, Process Optimization, Business Partnering with Cross-functional Teams

Soft Skills: Analytical Thinking, Problem Solving, Business Communication, Leadership, Stakeholder Management, Cross-functional Collaboration, Attention to Detail, Decision Support

Leadership & Collaboration: Cross-functional Team Collaboration, Leadership, Project Management, Agile Project Management, Sprint Planning, Process Optimization, Technical Communication, Stakeholder Engagement, Problem Solving, Time Management, Conflict Resolution, and Business Communication.

EXPERIENCE

Intuit, USA | Financial Analyst

Aug 2024– Present

- Performed financial data analysis, forecasting, and variance analysis on revenue, expenses, and customer behavior metrics, driving actionable insights that improved financial planning accuracy by 20%.
- Developed and automated monthly, quarterly, and annual financial reports using Excel, SQL, and Tableau, ensuring accurate reporting of KPIs such as cash flow, profitability, and operating margins.
- Conducted budgeting, forecasting, and cost-benefit analysis to support strategic initiatives, enhancing resource allocation efficiency and reducing operational expenses by 15%.
- Partnered with product, engineering, and business teams to evaluate pricing models, ROI on new product launches, and customer acquisition costs (CAC), contributing to data-driven decision-making.
- Created interactive dashboards in Power BI/Tableau to track financial performance, compliance metrics, and profitability trends across multiple business units, accelerating leadership reporting efficiency by 30%.
- Utilized SQL and Python to automate financial reconciliations, streamline variance reporting, and reduce manual reporting time by 25%.
- Collaborated with cross-functional stakeholders to monitor risk exposure, revenue forecasting accuracy, and investment opportunities, ensuring compliance with corporate governance and regulatory standards.
- Supported quarterly earnings preparation, audit readiness, and FP&A operations, ensuring alignment with GAAP and Intuit's financial compliance framework.

HCL Tech, India | Financial Analyst

Jun 2019 - Jul 2023

- Developed and automated financial models using Excel (Power Query, Pivot Tables, VBA, Macros) and SQL to support software development cost allocation, cloud infrastructure capitalization, and IT asset tracking for 49+ enterprise technology projects, enabling ₹230+ Cr in cost recovery and improving asset register accuracy.
- Designed and implemented GAAP- and SOX-compliant financial audit frameworks for ₹1,600+ Cr in software, hardware, and cloud-based assets, led compliance training for a 12-member finance team, strengthening risk mitigation, internal controls, and audit-readiness across quarterly and annual reviews.
- Managed financial onboarding, cost center alignment, and payroll mapping for 4,000+ delivery, HR, and consulting professionals across global IT projects, reducing misallocations by 70% and driving ₹40+ Cr spend recovery; oversaw month-end close, revenue recognition, and deferred revenue for ₹4,000+ Cr client contracts.
- Delivered Financial Planning & Analysis (FP&A) for ₹800+ Cr SaaS, managed services, and IT consulting portfolios, automated contract approval workflows (accelerated by 83%), and developed Tableau dashboards providing real-time strategic insights for 500+ client projects.
- Led budgeting, forecasting, and variance analysis for ₹1,850+ Cr in IT development and infrastructure investments, identified ₹80L+ recurring risks, optimized procurement strategies, and ensured compliance with client audit requirements and internal controls.
- Automated reporting pipelines and real-time executive dashboards, reducing manual reporting effort by 87% and enabling instant profitability, utilization, and project margin analysis for board-level decision-making.
- Partnered with delivery managers, procurement, and finance leadership to align cost control strategies, revenue growth objectives, and compliance initiatives, ensuring robust financial planning and operational efficiency in global IT services delivery.