# John Richardson

Statistical Analyst

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## Summary

Statistical analyst focused on driving business outcomes through data-based decision making. At Charles Schwab, I utilized my knowledge in econometrics and skills in R, Python, Excel, Tableau, and SQL to drive a 5% increase in the net promoter score, persuade leadership to purchase a million-dollar AI software contract, and lead the A/B testing department to an estimated $4 million in net new revenue.

## Experience

**Charles Schwab | April 2020 – Jan 2024**

**Senior Statistical Analyst | March 2022 – Jan 2024**

- In 2023, changes made by my recommendation resulted in a 5% lift in client promoters. This was achieved by surfacing data backed insights and communicating findings in an easy to digest format for both technical and non-technical audiences while focusing on the actionable takeaways for stakeholders.
- Discovered an approximate $11000 difference in client lifetime value between promoters and detractors. This allowed my team to quantify the outcomes of other projects at the firm aimed at increasing the net promoter score.
- Uncovered an opportunity to increase high volume trader activity by up to 5%. This was found through two discoveries; that traders rating Schwab's research experience as "hard" traded 20% less often, and traders rated the experience as hard 30% more often than the general client population.
- Persuaded leadership to make a million-dollar purchase of an AI based call grading software using the machine learning technique, k-nearest neighbors. My work uncovered severe bias in our internal metrics which led to overstated agent grades and worse client outcomes.
- Aggregate data from multiple sources across google cloud platform (GCP) to build and automate a diagnostic dashboard in Tableau. The dashboard enabled my team to quickly identify problem areas within key retail segments by visualizing deltas in numerous surveys and attributing the change in the net promoter score to each segment.
- Build and maintain a time-series forecasting model for the net promoter score. The model is meant to set expectations for monthly scores and serve as a basis for digging into potential problem areas.
- Organize and transform unstructured customer comment data into metadata that maps survey responses to comment type categories using regular expression and natural language processing. The comment data serves as a valuable source of cross reference material for previously mentioned diagnostic visualizations of problem areas. Comments provide insight into the "why" of a bad score in a survey.

**Statistical Analyst | April 2020 – March 2022**

- Led A/B testing for digital product marketing stakeholders with the goal of improving user experience and driving net new account growth. As a direct result of changes I advocated for, Schwab realized an increase of more than 4 million in net new revenue.
- Responsible for a test which resulted in a 3% lift to account opens equating to roughly 1.2 million in annualized net new revenue. This was achieved through collaboration with marketing page owners and proactively seeking opportunities to understand user behavior.
- Took ownership of the initiative to redefine value add experience which led to hundreds of thousands of additional dollars saved by the program by defining the opportunity cost of every test which failed to outperform the control.

- Served as the subject matter expert in adobe analytics Ex: uncovering emerging traffic trends, identifying areas of opportunity within the client journey, working with the tagging team for ad tracking and testing purposes, discovering areas of difficulty within the client experience.
- Coordinate with stakeholders to identify achievable marketing metrics for success through analysis of site traffic and macroeconomic trends.
- Build and maintain automated reporting dashboards in adobe analytics and Tableau to help stakeholders understand and track progress against previously defined metrics.
- Pipeline data extracts from Adobe Analytics to Alteryx for efficient data transformation for use in Tableau dashboards.

**Economist Intern | GM Financial June 2019 – Aug 2019**

- Saved 2 hours a week for a senior analyst by automating visualizations in Excel which he was previously manually updating.
- Decreased the root mean squared error of the lease survival model by suggesting that the team manually adjust the weight of Buick sedans down. This was done after spotting the specific trend in my visualization work.

**Fund Accountant and Testing Support | Fidelity Jan 2017 – Aug 2018**

- Supported various corporate clients in testing of equitable 401k contribution amounts.
- Performed daily tasks centered around verifying price changes in ETFs.

## Skills & Abilities

- R | Python | Excel | Alteryx | Adobe Analytics
- Google Cloud Platform | Teradata | Hive
- Data Visualization | Data Modeling | Forecasting

## Education

University of Texas at Arlington, MS Econometrics Dec 2019

Oklahoma City University, BBA Finance May 2016