

Dakota Whitis

Lexington, KY | 859-536-3866 | dakota@whitis.me
Portfolio: whitis.me/portfolio | LinkedIn: whitis.me/linkedin

Professional Summary

Data Analyst with experience designing databases, building KPI dashboards, and automating reporting pipelines to drive business strategy in insurance and sales operations. Skilled in SQL, Power BI, and data visualization, with a track record of transforming raw business data into insights that improve marketing, retention, and performance outcomes. Strong communicator able to bridge technical analysis with business decision-making.

Certifications

- **Microsoft Certified: Data Analyst Associate (PL-300)**
-

Technical Skills

- Data Analysis & Visualization: Power BI, Tableau, Excel (Pivot Tables, Power Query), Preset.io
 - Database & Querying: SQL (MySQL), database design, reporting pipelines
 - Business Intelligence: KPI tracking, forecasting, performance dashboards
 - CRM & Automation: Campaign reporting, process automation, customer analytics
-

Professional Experience

Partner | EIS Benefits | Lexington, KY | Mar 2023 – Present

- Designed and managed a MySQL database to centralize client and sales data, eliminating manual reporting and reducing data prep time by 40%.
- Built KPI dashboards in Preset.io and Power BI to track client retention, RSVP conversions, and sales performance; dashboards adopted by leadership to guide seminar strategy.
- Automated CRM processes for outreach and follow-ups, improving response efficiency and reducing missed contacts.
- Analyzed seminar marketing performance, uncovering oversaturation trends and leading to expansion into new geographic areas, which increased RSVP rates.

Senior Inside Sales Consultant | Angi | Oct 2022 – Jul 2023

- Consulted with small businesses on advertising solutions, using ROI discussions to guide adoption.
- Managed client accounts and tracked campaign performance, ensuring client goals were met.
- Operated in a high-volume outbound environment, consistently meeting or exceeding sales targets.

Life & Health Insurance Agent | Final Expense Services | Jun 2021 – Oct 2022

- Leveraged client data to identify cross-sell opportunities and improve outreach targeting.
- Maintained structured reporting on client contacts and conversion rates to refine marketing approaches.

Sales Team Leader / Consultant | MaveriConsulting, LLC | Nov 2018 – Jun 2021

- Led a D2D sales team, monitoring performance metrics and providing coaching.
 - Managed digital marketing campaigns, including **Facebook advertising**, to generate leads.
 - Built outreach strategies that expanded the client base significantly.
-

Education

Bluegrass Community and Technical College | Lexington, KY
Associate's Degree in Programming | Expected May 2026 | GPA: 4.0