

ZACHARY MORTENSON

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PROFESSIONAL SUMMARY:

Senior BI / Analytics Engineer with 5+ years on BigQuery (GCP), SQL, Python, dbt/Dataform, Airflow, and Looker. Cut data-warehouse cost by 40%, automated workflows to reduce manual effort 50%, and drove \$5M in savings through CX & inspection modeling. Built executive dashboards and CDC pipelines; specializing in ETL/ELT, dimensional modeling, and decision-grade analytics.

SKILLS:

Languages/Analytics: SQL (BigQuery), Python (pandas), R, JavaScript, Google Apps Script

Data Platform: Google Cloud / BigQuery, Cloud Storage

Orchestration/Modeling: Airflow, dbt, Dataform (SQLX), CI/CD (Git/GitHub)

BI/Visualization: Looker (LookML), Tableau, Mode, Excel

Methods: ETL/ELT, CDC, A/B testing & experimentation, KPI design, cohort/segmentation, dimensional modeling (star/snowflake)

PROFESSIONAL EXPERIENCE:

Openly, Boston, MA

January 2024 – Present

Sr. Business Intelligence Analyst

- Engineered external agency commission workflows using Python and Google APIs, reducing manual effort by 50% per month and streamlining financial reporting operations, enabling faster commission payouts and improved cash flow tracking.
- Spearheaded the adoption of Dataform as an ETL tool in collaboration with Data Engineering, cutting data warehouse costs by 40% and enhancing scalability, security, and query performance.
- Conducted customer experience optimization analyses and inspections modeling, identifying inefficiencies that led to an estimated \$5 million in cost savings while improving customer segmentation accuracy and operational decision-making.
- Architected and led two Change Data Capture (CDC) pipelines using JavaScript in Apps Script, enabling claims team members to track, review, and annotate claims history in real-time. This provided a structured historical data feed of all notes, checks, and reviews, improving visibility, compliance, and decision-making. The automation reduced manual labor hours for claims team members by 50%, resulting in annual cost savings of \$50K.
- Built and maintained 20+ Looker dashboards for executive leadership, delivering real-time insights on financial performance, customer retention, and operational efficiency, enabling data-driven strategic decisions.

Jasper, Boston, MA

January 2023 – July 2023

Data Analyst II

- Conducted an in-depth analysis on customer usage data, which informed a strategy shift that drove a 100% increase in trial conversions through improved engagement and onboarding.
- Collaborated with Data Engineering to develop and maintain 10+ data models in the warehouse, optimizing data refresh cycles with advanced incremental load techniques in DBT and SQL, reducing pipeline costs by 15% while improving data accuracy.
- Created and maintained 10+ KPI dashboards for stakeholders, utilizing Python, SQL, and Mode Analytics.
- Evaluated Customer Success advertising initiatives and provided strategic suggestions leading to a 20% uplift in click-through rate and 5% enhancement in customer product engagement.

Podium, Boston, MA

October 2022 – January 2023

Data Analyst

- Partnered with stakeholders to build data and reporting frameworks using SQL and Tableau. This enabled the delivery of real-time, automated insights into marketing funnel and campaign metrics, facilitating precise attribution to marketing channels.
- Automated marketing and CRM data analysis with SQL-based Business Intelligence solutions, reducing manual effort by 15% and improving reporting efficiency for marketing teams.

InMarket, New York, NY

November 2021 – October 2022

Marketing Insights Analyst

- Automated quarterly consumer insights reporting using Python, SQL, and Excel, cutting manual effort by 20 hours per quarter and improving data accuracy.
- Designed and implemented a classification system for sentiment analysis of tweets to leverage consumer sentiment surrounding current topics of interest; this provided supplemental information for PR content.
- Analyzed consumer data using BigQuery and Seaborn to uncover sentiment trends, providing PR teams with actionable insights that led to a 15% increase in press pickups.

Truveris Inc, New York, NY

November 2020 – November 2021

Associate Analyst

- Served as a lead analyst to help build more effective and efficient pharmacy markets for clients by performing volume and cost modeling on claims data to ensure PBMs are meeting contractual obligations to clients.
- Collaborated with a team of four to develop a process automation tool using Alteryx and Python that reduced report delivery time to clients by 15%.
- Utilized SQL, Python and Excel to perform ad hoc analyses on pharmaceutical claims datasets that improved retention rate of high touch clients by 10%.

EDUCATION:

Bentley University, Waltham, MA

Bachelor of Science, Data Analytics, 2020