



Emily Greer

Senior Business Management Associate

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SUMMARY

Senior **business management** professional with six years supporting commercial banking and innovation focused organizations through strategic initiatives, executive reporting, project delivery, and performance analysis. Translates financial and **nonfinancial metrics** into clear insights, presentations, dashboards, and practical decisions for leaders serving **technology startups** and healthcare and **life sciences** companies. Advanced Excel and PowerPoint experience supports rapid analysis, polished reporting, and management storytelling. Builds Alteryx workflows and Qlik dashboard inputs that improve data quality and usability. Coordinates stakeholders, milestones, risks, controls, and next steps across concurrent work streams. Applies Agile and Scrum practices to simplify delivery and strengthen operating processes. Brings thoughtful design, intellectual curiosity, and responsive problem solving to complex business needs, helping leadership act with better information and stronger execution.

EXPERIENCE

Senior Business Management Associate

Catalyst Harbor Bank 📅 January 2024 - Present 📍 Charlotte, NC

Lead **strategic work streams** for commercial banking teams serving technology startups and healthcare and life sciences companies. Support executive decisions through reporting, analysis, data workflows, dashboard design, risk controls, and Agile delivery coordination.

- Connected growth priorities with executive reporting and operating metrics for innovation focused banking teams.
- Built Excel and Alteryx workflows that supplied governed inputs for Qlik management **dashboards**.
- Translated financial and nonfinancial trends into **PowerPoint** narratives for operating reviews and strategy sessions.
- Mapped reporting risks to **mitigating controls**, accountable owners, and documented remediation follow through.
- Created dashboard **wireframes** and presentation **mockups** that clarified metrics, hierarchy, and stakeholder decisions.
- Coordinated Agile planning across dependencies, priorities, decisions, and executive requests for cross functional initiatives

Business Management Associate

VentureBridge Financial 📅 July 2022 - December 2023 📍 Raleigh, NC

Supported **business management** for bankers serving venture backed technology and healthcare clients. Managed reporting redesigns, performance analysis, project coordination, dashboard concepts, stakeholder communication, and control reviews across **finance**, coverage, operations, and data partners.

- Linked client activity, pipeline movement, revenue indicators, and priorities within leadership performance views.
- Developed **Excel** models and PowerPoint reporting packs with validated data and concise trend commentary.
- Converted working session decisions into owners, milestones, dependencies, and follow up actions.
- Prototyped Qlik dashboard layouts through short feedback cycles with **business** managers and data partners.
- Facilitated **Scrum** check ins that clarified blockers and sequenced reporting redesign deliverables.
- Reviewed process exceptions and control gaps, supporting evidence based remediation plans with clear deadlines

Business Analyst

Meridian Strategy Partners 📅 June 2020 - June 2022 📍 Durham, NC

STRENGTHS

- 💬 **Executive storytelling**
Turned dense metrics into clear presentations, and leaders used those narratives during operating reviews.
- 📊 **Data workflow design**
Built cleaner reporting paths with Excel and Alteryx, giving managers more confidence in dashboard inputs.
- ♥️ **Risk and controls**
Flagged reporting gaps during process reviews, then worked with owners until practical controls were in place.
- 👥 **Stakeholder coordination**
When priorities shifted, kept owners and milestones visible so cross functional work continued without confusion.
- ➡️ **Visual communication**
Started with a simple wireframe, gathered feedback, and shaped dashboards that made decisions easier to discuss.

SKILLS

Business Management

Strategic Initiatives

Executive Reporting

Business Analysis

Project Management

Data Infrastructure Trend Analysis

Financial Metrics

Risk Identification Excel

[PowerPoint](#) [Alteryx](#)

[Qlik Dashboards](#)

[Data Visualization](#) [Wireframing](#)

LANGUAGES

English Native

Spanish Intermediate

MY CAREER



● Senior Business Management Associate at Catalyst Harbor Bank (2.7 Years)

● Business Management Associate at VentureBridge Financial (1.4 Years)

● Business Analyst at Meridian Strategy Partners (2 Years)

Delivered **business analysis** for financial services and growth company engagements. Organized operational and financial information into **decision support**, presentation materials, dashboard concepts, project records, and repeatable reporting processes for client managers and project leads.

- Structured operational and financial data into findings that guided client managers and project leads.
- Built Excel analyses with lookup, pivot, and scenario techniques to examine performance patterns.
- Produced PowerPoint presentations that connected charts, concise messages, and logical executive story flow.
- Created dashboard mockups that aligned stakeholders on metric definitions and visual priorities before development.
- Managed project tracks through schedules, meeting materials, issue logs, and decision records.
- Simplified recurring reporting handoffs through documented process reviews and standardized delivery steps

PROJECTS

Management Information Workflow 📅 2025

A practical reporting improvement effort connected Excel and Alteryx inputs with Qlik dashboard needs. Clearer definitions and cleaner handoffs gave business managers more usable information for performance discussions.

Reporting Redesign Work Stream 📅 2023

A collaborative redesign effort turned manager feedback into dashboard layouts, presentation wireframes, and sequenced delivery steps. Short review cycles helped stakeholders reach decisions with less rework.

LEADERSHIP & AWARDS

- Received Alteryx Designer Core Certification in 2025 for data preparation and workflow capability.
- Earned Certified ScrumMaster credential in 2024 after supporting structured Agile and Scrum delivery practices.
- Recognized by business leaders for clear executive reporting, thoughtful analysis, and dependable follow through.

EDUCATION

Bachelor's Degree in Finance

University of North Carolina at Charlotte 🎓 GPA: 4.0 📅 2020 📍 Charlotte, NC

Coursework: Financial analysis, corporate finance, investment analysis, business analytics

CERTIFICATIONS

- Alteryx Designer Core Certification 📅 2025
- Certified ScrumMaster 📅 2024

TECHNICAL SKILLS

- **Spreadsheet Analysis:** Microsoft Excel, PivotTables, Lookup Functions
- **Presentation Development:** Microsoft PowerPoint, Executive Decks, Presentation Design
- **Data Preparation:** Alteryx Designer, Data Blending, Workflow Automation
- **Data Visualization:** Qlik Sense, Qlik Dashboards, Dashboard Wireframes
- **Project Delivery:** Agile, Scrum, Sprint Planning
- **Business Analysis:** Trend Analysis, Financial Metrics, Performance Indicators
- **Risk Management:** Risk Identification, Mitigating Controls, Issue Tracking
- **Reporting Systems:** Management Reporting, Data Infrastructure, Information Quality
- **Design Methods:** Wireframing, Mockups, Information Hierarchy
- **Stakeholder Engagement:** Executive Support, Global Managers, Cross Functional Coordination

PROFESSIONAL AFFILIATIONS

- Commercial banking professional community, Charlotte, North Carolina.
- Agile and Scrum practitioner community focused on practical delivery and team coordination.

ADDITIONAL INFORMATION

Work Status : Authorized to work in United States. No sponsorship required.

REFERENCES

AVAILABLE ON REQUEST