

STRENGTHS

-  **Scenario Thinking**
Built pricing, cost, margin, and compensation scenarios for planning decisions; leaders gained a clearer view of tradeoffs.
-  **Reporting Discipline**
Reworked recurring reports with governed refresh steps and shared definitions; manual effort fell and confidence grew.
-  **Executive Translation**
Turned multi-variable analysis into concise recommendations; sales leaders could separate timing effects from structural changes.
-  **Cross-Functional Work**
Resolved source-data questions with Sales, IS, and Finance; colleagues began seeking help on difficult reporting issues.
-  **Analytical Curiosity**
Tested AI-enabled tools through controlled pilots; practical evidence guided workflow decisions rather than assumptions.

SKILLS

<u>Sales analysis</u>	<u>Scenario modeling</u>
<u>Pricing analysis</u>	<u>Margin analysis</u>
<u>Compensation modeling</u>	
<u>Annual planning</u>	<u>Forecasting</u>
<u>Power Query</u>	<u>SQL</u>
<u>Tableau</u>	
<u>Power BI</u>	<u>Alteryx</u>
<u>Python</u>	
<u>Data quality</u>	<u>Financial analysis</u>

LANGUAGES

English	Native
Spanish	Intermediate

SUMMARY

Commercial Analyst with more than four years translating sales, pricing, margin, compensation, and resource-allocation data into practical decisions for **commercial leadership**. Builds scenario models across **large datasets**, compares modeled and actual performance, and turns year-over-year and run-rate findings into clear recommendations. Advanced Excel, Power Query, SQL, Tableau, Power BI, Python, and Alteryx support dependable forecasting, reporting, and data-quality workflows. Partners with Sales, IS, and Finance on **reporting requirements**, **business definitions**, source-data issues, and timely management visibility. Evaluates AI-enabled analytics tools through controlled pilots and communicates complex financial logic in concise language for analysts and executives. Ready to help Northstar MedTech Solutions strengthen commercial planning, improve reporting accuracy, and connect financial insight with better sales decisions.

EXPERIENCE

Senior Commercial Analyst

Summit Surgical Supply Co.

 January 2025 - Present

 Columbus, OH

Owns commercial scenario modeling, management reporting, forecasting pilots, and performance analysis for a multi-region sales portfolio. Leads work with Sales, IS, and Finance, helping leaders connect pricing, cost, margin, compensation, and resource decisions with financial results.

- Built **pricing** and margin scenarios for **annual planning**, clarifying tradeoffs across multi-region sales portfolios.
- Presented modeled-versus-actual reviews using variance analysis, guiding territory and resource-allocation decisions.
- Rebuilt sales reports with **Power Query**, SQL, and **Power BI**, replacing manual spreadsheet consolidation.
- Piloted AI-enabled **forecasting** tools through controlled scenarios, comparing traceability, usability, and output quality.
- Created year-over-year and run-rate analyses, giving leadership consistent views of projected and realized outcomes.
- Partnered with IS and **Finance** on source-data issues, reporting requirements, and dashboard accuracy improvements

Commercial Analyst

Blue Ridge Diagnostics

 July 2023 - December 2024

 Cincinnati, OH

Developed commercial models, queries, and executive reporting for sales reviews and annual operating plans. Connected customer, product, pricing, cost, territory, and resource data with Finance-controlled definitions so leaders could act on consistent performance signals.

- Developed Excel and Tableau models combining customer, product, pricing, and cost data for planning.
- Built SQL **queries** for **sales management**, validating joins and aggregation logic against Finance totals.
- Measured territory trends and resource **utilization** through **run-rate analysis**, identifying segments needing leadership review.
- Prepared pricing scenarios quantifying contract, incentive, and base-cost effects across priority product groups.
- Standardized revenue and **margin** definitions with Sales Operations, IS, and Finance, reducing reporting conflicts.
- Translated multi-variable findings into **executive presentations**, separating timing effects from structural performance changes

Sales Analytics Associate

HarborPoint Medical Distribution

 January 2022 - June 2023

 Louisville, KY

Supported regional account teams through weekly sales and **financial analysis**, recurring reporting, scenario work, and data-quality reviews. Coordinated competing requests across Sales, IS, and Finance while keeping management views accurate, timely, and easy to interpret.

MY CAREER



- Senior Commercial Analyst at Summit Surgical Supply Co. (1.7 Years)
- Commercial Analyst at Blue Ridge Diagnostics (1.4 Years)
- Sales Analytics Associate at HarborPoint Medical Distribution (1.4 Years)

- Maintained weekly **sales analysis** with CRM extracts, invoices, and product data in Excel workbooks.
- Created Power Query transformations and quality checks for recurring territory, customer, and product reports.
- Supported pricing, cost, margin, and **compensation** scenarios by documenting assumptions and reconciling outputs.
- Produced year-over-year summaries explaining volume, mix, and timing drivers behind commercial performance changes.
- Used SQL and **Tableau** to build management views of pipeline activity and resource utilization.
- Coordinated discrepancy reviews with **Sales, IS,** and Finance during established planning cycles

PROJECTS

Commercial Forecasting Pilot 📅 2025

Evaluated AI-enabled forecasting and reporting workflows through controlled scenarios. Compared output quality, traceability, usability, and fit with planning decisions before recommending adoption.

Sales Reporting Governance 📅 2024

Created shared reporting definitions across revenue, margin, active accounts, and resource utilization. Connected SQL validation with Tableau and Power BI management views.

LEADERSHIP & AWARDS

- Finance Analytics Excellence Award, Summit Surgical Supply Co., 2025
- Dean's List, University of Kentucky, 2020
- Treasurer, University of Kentucky Finance Association, 2020 - 2021

EDUCATION

Bachelor of Science in Finance

University of Kentucky 🎓 GPA: 3.8 📅 2021 📍 Lexington, KY

Coursework: Financial analysis, Accounting, Business analytics, Applied statistics

CERTIFICATIONS

- Microsoft Certified: Power BI Data Analyst Associate 📅 2024
- Alteryx Designer Core Certification 📅 2023

TECHNICAL SKILLS

- **Spreadsheet Analysis:** Microsoft Excel, PivotTables, Power Query
- **Database Querying:** SQL, joins, aggregations
- **Business Intelligence:** Power BI, Tableau, dashboards
- **Data Preparation:** Alteryx, Power Query, data cleansing
- **Programming:** Python, pandas, scripting
- **Financial Modeling:** Pricing, base cost, margin
- **Sales Analytics:** Territory trends, run-rate, productivity
- **Planning Analysis:** Annual planning, forecasting, scenarios
- **Performance Reporting:** Modeled-versus-actual, variance analysis, KPIs
- **Data Governance:** Business definitions, validation, data quality
- **AI Analytics:** AI-enabled tools, pilot evaluation, forecasting
- **Reporting Platforms:** Sales dashboards, management reports, data refresh

PROFESSIONAL AFFILIATIONS

- Volunteer Data Coach, Columbus Finance Professionals Network, 2025 - Present
- University of Kentucky Finance Association, Treasurer, 2020 - 2021

ADDITIONAL INFORMATION

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

REFERENCES

AVAILABLE ON REQUEST