

# Stephen Cox

Bachelor of Business Administration - Finance (University of Texas Arlington)



## Professional Experience

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### **PRINCIPAL MARKETING BUSINESS INTELLIGENCE ANALYST – Blucora | TaxAct (Feb 2021 – Current)**

- Work alongside CEO & VPs – including marketing, product, finance, etc.- to define requirements, create KPIs, & provide actionable data with dashboards across multiple projects on time
- Created & implemented Tableau dashboard portfolio from scratch. This was an effort to centralize our data & provide actionable insights/dashboards, rather than just data pulls
- Develop complex data models using SQL, Python, Tableau Prep, etc. from multiple data sources to create visually appealing portfolio of dashboards that contribute to value creation
- Analyze customer data to provide feedback regarding ROAS, TAM, ARPU, MAU, & other key KPIs to increase market space, create new revenue streams, & optimize current revenue streams
- Lead data migration project (SQL Server to Snowflake) - duties include high level updates & coordinating with team members to ensure data integrity, data query optimization, & data ELT

### **SENIOR BUSINESS INTELLIGENCE ANALYST – Blucora | TaxAct (Mar 2020 – Feb 2021)**

- Front End Development: Create & maintain dashboards that display large sets of information from multiple data sources in easy-to-read actionable views - providing automated solutions
- Back End Development: Clean & maintain large data sets from multiple sources (Google Analytics, Nielsen, TaxAct Database, etc.) using SQL Server, Python, & Tableau Prep

### **SENIOR FINANCIAL PLANNING & ANALYSIS ANALYST – McKesson Corporation (Nov 2019 – Feb 2020)**

- Process Optimization: Centralize & standardize FP&A processes across multiple business units utilizing full set of technology tools (SQL Server, TOAD, Tableau, Power BI, etc.)
- Create and maintain margin analysis dashboards - leading to increased revenue

### **BUSINESS INTELLIGENCE ANALYST – McKesson Corporation (Feb 2018 – Nov 2019)**

- Front End Development: Utilize interface design principles to solve problems, provide insights, & display data for customers utilizing Tableau, Looker, Power BI, Excel, etc.
- Back End Development: Utilize SQL Server, SAP HANA, Snowflake, TOAD, Python to clean data

### **FINANCIAL OPERATIONS SUPPLIER RELATIONS MANAGER – McKesson Corp (Dec 2017 – Feb 2018)**

- Maintain working relationship with top 10 suppliers by analyzing, and managing financial data

### **FINANCIAL OPERATIONS ANALYST – Clover Technology (April 2015 – Dec 2015)**

## Tools

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Tableau | Python | R | SQL | Snowflake | Tableau Prep | Power BI | Excel | Spark Beyond | Salesforce

## Areas of Expertise

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**Lead Large-Scale Projects | Mentor & Grow Careers | Create & Implement Training Tools | Agile Principles  
Communicate With Tech/Non-Tech Roles | Implement Insight Creation & Trend Analysis To Increase Profit**

*“People with whom Stephen work are aware of his excellent organizational qualities and commercial aptitude. He is alert to what is happening around him and concerned primarily with the here and now. He is a natural manager and finds himself in command through his ability to plan and keep both long and short-term objectives clearly in mind.” – Pulled From ‘The Insights Discovery - Insights Preference Evaluator’*

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