

Financial Modeling / Operational Analytics

We help startups and growing companies organize and understand their data. We partner with organizations to turn complex financial and operational data into actionable insights through reporting, KPIs, and dashboards, and we support the implementation of our recommendations.

Core Areas of Support

- Conducting diagnostics of operational drivers and financial health
 - Benchmarking performance against industry standards and close comparables
 - Building financial forecasts and analytics models for startups and scaling growth stages
 - Advising on business strategy and driving execution of improvement initiatives
 - Measuring and validating ongoing performance through KPIs and dashboards
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Relevant Experience

Startup (Hospitality / B2B SaaS Application)

Developed initial financial models and operational dashboards for a fast-growing startup that facilitated waitlist queuing and reservation management. Monitored business operations and supported creation of materials to be used in financial reporting and investor presentations.

Startup & Early Stage (Pre-seed ISP Startup)

Led the development and submission of grant applications securing eligibility for \$20M in broadband infrastructure funding, including financial modeling, business case development, and compliance documentation. Designed internal forecasting and reporting frameworks to bring visibility to performance and support cash flow, capital planning, and executive decision-making.

Scaling Organization (Enterprise Technology / Energy & Utilities)

Built P&L models for projects totaling \$150M revenue. Directed \$2M operational analytics program in co-development with client, enabling \$100M in savings. Developed a \$75M SaaS analytics proposal aligned to client needs, winning the deal in a competitive bid against three other vendors.

Large Enterprise (Consumer Packaged Goods / Manufacturing)

Drove integration of sales analytics during a \$600M acquisition, migrating a legacy Snowflake database within the parent company's data lake. Built standardized data models and Tableau dashboards for post-merger analytics supporting strategic sales decision-making.

Key Differentiators

Deep quantitative background with hands-on experience in operational finance across startups, mid-market, and enterprise organizations. Industry-agnostic, skilled at designing tailored structures and analytic frameworks and providing a clear roadmap to implement within operations.

