Luke Mattson

About

Senior financial professional with over **10 years** of accounting, operations, financial planning and data analysis experience in multiple industries. Expert in leading **financial modeling and KPI reporting**, with an emphasis on **process improvement, dashboard development,** and managing strategic projects across multiple teams and verticals.

Job Experience

Senior Analyst, Sales Strategy & Operations
ServiceTitan | Software Development | Seattle, WA (Remote)
July 2022 – Present (2 yrs)

- Provided sales strategy and GTM planning for expansion products achieving 160% ARR revenue growth in 2023.
- Managed major project initiatives across Sales, Product, Marketing and Data Science teams.
- Built annual operating plans, AE quota and headcount plans, and conducted monthly and quarterly sales forecasting.
- Defined critical sales KPIs and advised sales directors on historic metrics and product performance through deep sales channel analysis.
- Owned Salesforce month close process and reporting integrity.

Senior Analyst, FP&A and Business Intelligence
Frontier Door & Cabinet | Manufacturing | Tacoma, WA
Jan 2020 – June 2022 (2 yrs 6 mos)

- Worked with CIO and senior managers to develop and deploy custom Power BI dashboards across manufacturing, resource management, and project management capacities.
- Modeled manufacturing and labor WIP for over $100 million in ongoing project contracts, and reviewed with CEO monthly.
- Advised CFO on business forecasts, market research and expansion, M&A analysis and other FP&A special projects.
- Programmed and launched automated expense reporting and emailing for employee credit card statements using Excel VBA.
- Coded Excel algorithms to parse GL data, and used Power Query to aggregate this data into meaningful dashboards.

Business Intelligence Engineer
Amazon Fresh | Ecommerce | Seattle, WA
Nov 2018 – June 2019 (8 mos)

- Developed SQL queries based on product KPIs to identify and correct ordering for 20k idle inventory items across warehouses.
- Operated as the Data and Reporting SME for the grocery vertical to provide technical query support for peers and managers.
- Built SQL query to analyze cubic space vs sales per ASIN item for ranking physical goods by warehouse footprint and sales velocity.
- Prepared and presented monthly sales reports and dashboards for in-person reviews with strategic vendor Nestlé.

Contact

Email: excelvikingco@gmail.com
Location: Seattle, WA

LinkedIn Profile

linkedin.com/in/mattsonluke/

Education

CareerFoundry
UX Design, Certificate   2020

Western Washington University
Finance BA   2010

Technical Experience

Data Analysis and Visualization
- Snowflake
- Redshift
- Tableau & Tableau Prep
- Power BI
- Salesforce

SQL and ETL
Advanced experience with query development, data schemas, stored procedures, complex joins, CTEs, subqueries, data warehouses, query migration etc.

Microsoft Excel & Google Sheets
Advanced experience with Visual Basic, DAX, macros, power query, pivot tables, complex formulas, algorithms, data modeling and dashboards, lookups, if-and-or logic, and statistical analysis

ERP Accounting Systems
- Epicor
- Agility
- Sage
- ComputerEase
- Zoura

Pricing Analyst

Amazon Web Services | Cloud Computing | Seattle, WA
Dec 2016 – Nov 2018 (2 yrs)

- Cut 80 hours of collective monthly work for the analyst team by improving AR aging reports with key data points using SQL.
- Worked with operations team to build out and launch Salesforce as the primary pricing SOR for over 1,000 unique B2B contracts.
- Eliminated 40 hours of monthly analyst work by building an Excel tool for scraping multiple workbook tables to pull customer credits.
- Analyzed monthly sales for book of AWS enterprise customers with a combined contract value of $1 billion in revenue.

Accountant

TEAGUE | Industrial Design | Seattle, WA
Mar 2012 – Nov 2016 (4 yrs 9 mos)

- Eliminated 40 hours of monthly data entry by developing an Excel template for importing coded expense lines into Epicor's ledger.
- Mined and reconciled 12 years of detailed project financials from Epicor for ERP migration.
- Completed full balance sheet accounting and GL entries.
- Owned all accounting for full ledger of $12 million in fixed assets.
- Prepared journal entries and completed reconciliations for month close and annual external audits.

Buyer

TEAGUE | Industrial Design | Everett, WA
May 2011 – Mar 2012 (11 mos)

- Generated and executed purchase orders in support of the aircraft interiors prototyping team.
- Researched product pricing and lead-time estimation for all purchase order requests.
- Developed a detailed Excel tracking spreadsheet for monitoring vendor pricing and product purchases.

Other Applications

- Salesforce
- Dataloader.io
- Xappex
- Jira
- Asana
- Slack
- Zoom
- Adobe Creative Cloud
- Microsoft Office
- Windows OS
- Mac OS

Program Experience

- Business Analysis
- Requirements Gathering
- User Experience Design
- User Acceptance Testing
- SOP Documentation