Jordan Ellis | Business Analyst | Process Improvement & Data Insights

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Basics

- Business analyst with 6+ years of experience translating complex business needs into actionable technical requirements
- Skilled in process mapping, stakeholder facilitation, and data-driven decision support across finance and SaaS domains
- Proficient in SQL, Tableau, and Agile delivery, with a track record of improving operational efficiency and user adoption
- Strong communicator who bridges gaps between business leaders, product teams, and engineering stakeholders

Education

University of California, Berkeley **https://www.berkeley.edu/**

Bachelor, Business Administration, Score: 3.8 *Sep 2014–Jun 2018*

- Graduated with honors and a concentration in business analytics and information systems
- Completed capstone project on optimizing customer onboarding workflows for a regional financial services firm
- Developed strong foundations in quantitative analysis, process design, and cross-functional collaboration

Courses: Business Analytics, Financial Accounting, Operations Management, Statistics for Business, Information Systems, Marketing Research, Corporate Finance, Managerial Economics

Work

Northwind Analytics **https://www.northwindanalytics.com**

Senior Business Analyst *Jan 2022–Present*

- Lead requirements elicitation and process discovery for a portfolio of data platform and reporting initiatives
- Facilitate workshops with product, finance, and operations stakeholders to define scope, acceptance criteria, and success metrics
- Translate business rules into user stories, data mappings, and functional specifications for engineering teams
- Partner with QA and business owners to coordinate UAT, defect triage, and post-launch adoption tracking
- Mentor junior analysts and contribute to the BA community of practice through templates, coaching, and peer reviews

Keywords: Requirements Elicitation, Process Improvement, Stakeholder Management, Agile Delivery, UAT Coordination, Data Mapping

BlueRiver Financial **https://www.blueriverfinancial.com**

Business Analyst *Jun 2019–Dec 2021*

- Supported digital transformation projects across lending, servicing, and member experience teams
- Documented current-state and future-state processes, identifying automation opportunities that reduced manual effort by 25%
- Built SQL queries and Tableau dashboards to track KPIs, operational bottlenecks, and customer behavior trends
- Coordinated requirement reviews, sprint demos, and change requests with product owners and technical leads
- Created test scenarios and assisted business users during UAT cycles for new workflow and reporting releases

Keywords: Business Process Mapping, SQL, Tableau, Agile Scrum, UAT, Financial Services

Cedar Point Consulting **https://www.cedarpointconsulting.com**

Junior Business Analyst *Jul 2018–May 2019*

- Gathered and documented business requirements for small-business technology and operations projects
- Prepared meeting notes, process flows, and requirement traceability matrices to support project delivery
- Conducted data validation and basic reporting to help clients monitor project outcomes and service levels
- Collaborated with senior consultants to prepare client presentations and implementation roadmaps

Keywords: Requirements Documentation, Process Flows, Data Validation, Client Presentations

Languages

English: Native or Bilingual Proficiency

Spanish: Limited Working Proficiency **Keywords**: Business conversations, Client support

Mandarin: Elementary Proficiency **Keywords**: Basic conversation

Skills

Business Analysis: Expert **Keywords**: Requirements Elicitation, Process Mapping, Stakeholder Management, Gap Analysis, User Stories

Data Analysis: Advanced **Keywords**: SQL, Tableau, Excel, Power BI, Data Visualization

Project Delivery: Advanced **Keywords**: Agile Scrum, UAT Coordination, Change Management, Risk Management

Tools: Intermediate **Keywords**: Jira, Confluence, Visio, Lucidchart, Smartsheet

Awards

Excellence in Business Analysis Award

Northwind Analytics *Nov 2023*

Recognized for leading a cross-functional requirements program that improved delivery predictability and stakeholder satisfaction across three product teams.

Dean's List

University of California, Berkeley *May 2017*

Awarded for sustained academic achievement in the Business Administration program.

Certificates

Certified Business Analysis Professional (CBAP) **https://www.iiba.org/certification/cbap/**

International Institute of Business Analysis *Mar 2021*

Professional Scrum Master Ihttps://www.scrum.org/professional-scrum-certifications/professional-scrum-master-i-certification

Scrum.org *Aug 2022*

Tableau Desktop Specialist **https://www.tableau.com/learn/certification/desktop-specialist**

Tableau *Jan 2023*

Publications

Northwind Analytics Insights **https://www.northwindanalytics.com/insights/bridging-it-business**

Bridging the Gap Between IT and Business: A Practical Framework *Sep 2023*

- Presents a repeatable framework for aligning business stakeholders and technical teams during discovery
- Outlines techniques for requirement prioritization, process documentation, and measurable acceptance criteria
- Includes practical templates and lessons learned from data platform and reporting initiatives

Projects

Customer Onboarding Process Redesign

A cross-functional initiative to simplify customer onboarding and reduce time to first value. *Jan 2023–Jun 2023*

- Mapped current-state onboarding journeys across sales, operations, and support teams
- Facilitated stakeholder workshops to prioritize pain points and define future-state workflow requirements
- Partnered with engineering and QA to deliver phased improvements, including automated document collection and status tracking
- Established KPIs and a post-launch dashboard to monitor cycle time, handoffs, and customer satisfaction

Keywords: Process Redesign, Customer Onboarding, Workshop Facilitation, KPI Reporting

Sales Forecasting Dashboard

A Tableau dashboard that consolidated pipeline, bookings, and renewal data for sales leadership. *Mar 2021–Aug 2021*

- Defined dashboard requirements and metric definitions with sales operations and finance stakeholders
- Wrote SQL queries to combine data from CRM, billing, and contract systems
- Built interactive Tableau views for pipeline health, forecast variance, and segment performance
- Delivered training and documentation to support weekly forecasting reviews and executive reporting

Keywords: Tableau, SQL, Sales Operations, Forecasting

Interests

Data Storytelling: Tableau, Power BI, Narrative Visualization

Community: Mentoring, Volunteering, Professional Development

Volunteer

Bay Area Business Analysts Association **https://www.babaa.org**

Volunteer Mentor *Jan 2022–Present*

- Mentor early-career business analysts on requirements gathering, stakeholder communication, and career development
- Review portfolio artifacts and provide feedback on process mapping, user stories, and data analysis approaches
- Support association events and workshops focused on business analysis best practices