

# Alexis Davis, MBA

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## PROFESSIONAL SUMMARY

Financial and data analytics professional with an MBA and Bachelor of Science in Finance, bringing experience in healthcare, insurance, federal government, banking, and financial services. Skilled in financial analysis, revenue and expense reporting, financial forecasting, budgeting, account reconciliations, variance analysis, and identifying cost and performance trends. Experienced developing financial and operational reports, validating data accuracy, investigating discrepancies, and presenting actionable findings to management. Proficient in Microsoft Excel, PivotTables, VLOOKUP, Power BI, SQL, and data visualization. Strong understanding of financial controls, regulatory compliance, and data-driven decision-making within complex healthcare and financial environments.

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## CORE COMPETENCIES

Financial Planning & Analysis (FP&A), Revenue & Expense Analysis, Financial Forecasting & Budgeting, Financial Reporting & Reconciliation, Variance Analysis & Trend Identification, Healthcare & Insurance Operations, Cost Analysis & Performance Monitoring, Financial Data Validation & Quality Assurance, Monthly & Quarterly Reporting, Advanced Microsoft Excel & PivotTables, Power BI, Reporting & Data Visualization, Executive Reporting & Presentations, Process Improvement & Financial Controls, Cross-Functional Collaboration

## EDUCATION

**Masters of Business Administration (MBA)** | Claflin University | GPA: 3.7

**B.S. Finance** | Harris-Stowe State University | GPA: 3.4

## PROFESSIONAL EXPERIENCE

**Data Analytics Extern | Breaking Games | Remote** **Oct 2026 – Current**

- Designed an SQLite analytics database integrating six disconnected e-commerce data sources into a centralized system supporting business analysis, revenue reporting, and operational insights.
- Used SQL to clean, transform, join, and analyze financial and operational data, creating reusable database views to improve data quality and reporting reliability.
- Analyzed more than 400 referral sources to identify revenue-related performance patterns, marketing effectiveness, and opportunities to optimize future spending.
- Developed an interactive HTML and Chart.js dashboard to communicate business performance, inventory trends, and operational findings.
- Applied AI-assisted analytical tools to accelerate data preparation and analysis while independently validating results for accuracy and consistency.

**Management Analyst | U.S. Department of Health & Human Services (HRSA) | Remote** **Nov 2023 – Sept 2025**

- Analyzed complex financial, operational, and program performance data supporting a federal healthcare program, identifying trends, discrepancies, operational risks, and opportunities to improve efficiency.
- Developed Excel-based reports, PivotTables, and performance metrics to evaluate program outcomes, monitor operational performance, and support management decisions.
- Conducted recurring data reviews to validate information accuracy, investigate inconsistencies, and ensure compliance with established federal program requirements.
- Evaluated operational trends, resource utilization, and workflow performance to identify potential inefficiencies and recommend improvements.
- Prepared recurring analytical reports, executive presentations, and data-driven recommendations to communicate findings to management and cross-functional stakeholders.
- Collaborated with internal teams to resolve reporting discrepancies, improve data integrity, and strengthen internal controls and standardized reporting processes.
- Applied financial and operational analysis techniques to support program oversight, policy implementation, and continuous process improvement.

**Accountant | Blue Cross Blue Shield | Columbia, SC** **Aug 2023 – Nov 2023**

- Performed financial analysis, account reconciliations, and general ledger reviews to ensure the accuracy and integrity of financial information within a healthcare insurance organization.

- Supported monthly and quarterly financial reporting, forecasting, budgeting, and trend analysis to inform financial planning and operational decisions.
- Analyzed financial transactions, cash receipts, and account balances to identify discrepancies, investigate variances, and implement corrective actions.
- Processed and reconciled approximately 5–15 daily cash receipt transactions, maintaining accurate financial records and supporting internal accounting controls.
- Developed a centralized Excel tracking workbook to improve visibility into financial discrepancies, outstanding items, and reconciliation activities, streamlining month-end reporting processes.
- Collaborated with accounting personnel to support financial close activities, reporting accuracy, and adherence to established accounting procedures.

**Outreach Coordinator | Claflin University (AmeriCorps VISTA Contractor)**

**Mar 2022 – Mar 2023**

- Collected, organized, and analyzed program performance data to identify operational trends, evaluate outcomes, and support resource allocation decisions.
- Developed performance reports and presentations communicating program results and improvement opportunities to university leadership and stakeholders.
- Supported data-informed outreach initiatives that increased program enrollment by 31% and retention by 25%.
- Collaborated with university departments and external organizations to evaluate program effectiveness and implement operational improvements.

**Securities Operations Specialist | Wells Fargo Advisors (Temporary) | Remote**

**May 2021 – Mar 2022**

- Managed financial and operational information for more than 50 Priority Credit Line accounts, reviewing account documentation, balances, and transaction information for accuracy and compliance.
- Analyzed financial account data to identify discrepancies, processing exceptions, and operational risks requiring investigation or corrective action.
- Prepared financial documentation, account analyses, and business justifications supporting account modifications and operational decisions.
- Collaborated with cross-functional teams to resolve account discrepancies, improve processing accuracy, and maintain established financial controls.
- Supported high-volume financial operations while adhering to regulatory requirements and internal quality standards.

**Teller | U.S. Bank | St. Louis, MO**

**May 2019 – Feb 2021**

- Processed more than \$25,000 in daily financial transactions while maintaining accurate records and compliance with banking procedures.
- Reconciled cash balances and reviewed transaction records to identify discrepancies and maintain financial accuracy.
- Analyzed account information, resolved transaction issues, and supported branch financial operations.
- Maintained adherence to internal controls, regulatory requirements, and operational risk management procedures.

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**TECHNICAL SKILLS**

**Financial Analysis:** Financial Reporting, Financial Forecasting, Budgeting, Revenue & Expense Analysis, Variance Analysis, Account Reconciliation, General Ledger, Cost Analysis, Trend Analysis, Financial Data Validation

**Microsoft Excel:** PivotTables, VLOOKUP, SUMIF, COUNTIF, Financial Data Analysis, Data Reconciliation, Reporting Workbooks, Data Cleaning

**Business Intelligence & Analytics:** Power BI, Tableau, SQL, SQLite, Dashboard Development, Data Visualization, Data Integration, Data Quality Assurance

**Enterprise & Reporting Tools:** Microsoft PowerPoint, Word, Outlook, SharePoint, Teams, Jira

**Additional Tools:** HTML, Chart.js, Claude, AI-Assisted Data Analysis