RICK MASAHIRO TAKEUCHI

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PROFESSIONAL SUMMARY

Business operations and CRM professional with 6+ years of experience in financial forecasting, reconciliation, data analytics, and process improvement. Experienced with Excel, Salesforce, PostgreSQL, and SOQL, including professional SQL-based data querying and reporting. Improved forecast accuracy by 65%, reduced reporting turnaround by 40%, and shortened data-import processing by 80% through workflow redesign and data validation.

PROFESSIONAL EXPERIENCE

Positive Resource Center (PRC) **July 2025 - Present**
Donor Engagement & Database Manager *San Francisco, California*

- Redesigned event-data imports by separating new and existing contacts, matching CRM identifiers and contact details, and resolving exceptions before upload, cutting turnaround 80% from approximately two weeks to two days.
- Reconciled event transactions across Greater Giving and EveryAction through payment validation, ACH/wire donation review, and individual exception resolution, reducing event reconciliation time 75% from roughly eight weeks to two.
- Supported the Salesforce NPSP-to-EveryAction transition by validating constituent and transaction data, documenting workflows, and training staff, advancing change management while preserving data integrity and operational continuity.
- Validated and segmented 3,461 historical constituent records through contact matching, duplicate review, and audience classification, strengthening outreach pipelines and improving reporting accuracy.
- Built leadership reports analyzing gala revenue, sponsorship performance, pledge tracking, and event costs, translating findings into recommendations for operational planning and process optimization.
- Standardized 17 acknowledgment templates and documented usage, improving processing consistency, clarifying staff handoffs, and supporting reliable constituent communications through automation tools.

Foundation for a College Education **July 2021 - October 2024**
Senior Associate, Development & Systems *Menlo Park, California*

- Modernized Salesforce CRM and reporting with external consultants, strengthening donor segmentation, business analytics, and fundraising visibility for Development and Finance.
- Built an Excel revenue forecasting model that improved forecast accuracy by 65%, supporting grant and budget planning; partnered with the Development Director on FY22–FY25 budgets.
- Streamlined reporting workflows across Salesforce, SharePoint, and Excel, reducing turnaround time by 40% and accelerating operational information access for planning and decision support.
- Developed executive and board dashboards to communicate fundraising performance, track KPI indicators, and inform organizational planning and leadership decisions.
- Partnered with Finance on gift coding, revenue reconciliation, and reporting, supporting a $2 million institutional grant and maintaining accurate financial records.
- Established an internal request-tracking process and documented reporting procedures, naming conventions, field usage, and list-generation standards to improve consistent team workflows.

Foundation for a College Education **March 2020 - June 2021**
Development and Operations Associate

- Maintained accurate CRM records in Exceed Beyond, prepared campaign segments, and generated leadership and Finance reports supporting outreach and operational review.
- Built Excel tools to track student outcomes and consolidate program and fundraising information, enabling recurring operational reporting and process optimization across reviews.
- Reconciled gift coding and data discrepancies with Development and Finance, supporting consistent reporting across fundraising and financial records through cross-functional coordination.

PROJECTS & OUTSIDE EXPERIENCE

Rockbuster Video Rental **May 2023 - June 2023**

- CareerFoundry academic project analyzing Rockbuster Video Rental customer and rental data with PostgreSQL and SQL queries to identify revenue patterns, customer behavior, and audience segments relevant to revenue operations.

- Presented Tableau visualizations and business recommendations, translating Rockbuster Video Rental case study findings into actionable insights for decision-making.

Instacart, Online Grocery **July 2023 - September 2023**

- Analyzed grocery purchasing data with Python for a CareerFoundry academic project, cleaning records and segmenting customers to compare audience-group behavior and build skills transferable to funnel analysis.
- Created visualizations and audience-targeting recommendations from purchasing patterns for a CareerFoundry academic project, translating customer insights into potential campaign decisions.

EDUCATION

University of California - Santa Cruz **June 2019**
Bachelor of Science (BS), Biology

CareerFoundry **October 2023**
Data Analytics Bootcamp

SKILLS

Data & Automation Tools: Microsoft Excel, SQL, PostgreSQL, Python, Tableau, Smartsheet, Salesforce
Forecasting & Financial Operations: Revenue forecasting, Budget planning, Financial reporting, Data reconciliation
Business Performance & Reporting: Business analytics, Data analytics, Dashboard development, KPI reporting, Data visualization, Statistical analysis, Hypothesis testing, business performance
Process & Data Operations: Process improvement, Workflow documentation, Data validation, Data quality management, Requirements clarification, Cross-functional collaboration, Staff training, CRM modernization
Languages: English, Japanese, Chinese (Mandarin)