

# DEREK JONES

A Senior Excel Expert with 10+ of experience, specializing in financial reporting, data visualization, Tableau, pivot tables, and data analytics. A strong history of leading initiatives to automate data reporting for multimillion-dollar client accounts. Adept at delivering business solutions to improve data validation and visualization.

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## PROFESSIONAL EXPERIENCE

### EXCEL EXPERT

Westbrook Financial Consulting,  
San Diego, CA  
May 2016 – Present

- Serve as the Microsoft Excel subject matter expert for the delivery of reporting services to 50+ client accounts for business financials, real estate funds, operational data, cash flow, cost accounting, and financial forecasting
- Design, develop, and implement data reporting solutions according to client business requirements, including the creation of master spreadsheets, pivot tables, and graphs
- Oversee a project to streamline data entry and reporting for a real estate firm by developing formulas and data filters to support analysis of net-asset values

### EXCEL EXPERT

Cortez and Johnson Legal Associates,  
San Diego, CA  
May 2011 – May 2016

- Led a team of program coordinators and data analysts to migrate confidential data to a new internal CRM tool, which included creating comprehensive spreadsheets in Excel to validate the accuracy and integrity of client information
- Conducted research on the viability of the new CRM platform to reduce export processing time for data reports from one hour to two minutes

## EDUCATION

Bachelor of Science (B.S.)  
Computer Science  
San Diego, CA  
September 2007 - May 2011

## KEY SKILLS

- Microsoft Excel
- Vlookups
- Data Analytics
- Cell Formatting
- Data Manipulation

## CERTIFICATIONS

- Microsoft Office Specialist, Master Certification, 2015
- Excel Skills for Business Specialization, Coursera, 2011