JOYCE S. LU

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EDUCATION

Drexel University   Philadelphia, PA
Bachelor of Science in Business Administration
Business Analytics, Management Information Systems

SKILLS

Interpersonal

Adaptability, independent and self-motivated, team leader, quick learner, reliable, creative thinker, process and detail-oriented

Software/Technology

Power BI, Salesforce, Pardot, SQL Server Management Studio, Microsoft SQL Server, Microsoft Access, Excel, and PowerPoint, RStudio, Qlik Sense and Qlik script, Tableau, SAP BusinessObjects, Oracle Analytics Cloud, Oracle Eloqua

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EXPERIENCE

Orion Advisor Solutions

Marketing Data & Analytics Manager | March 2021 – Present

- Standardized lead scoring for all marketing generated leads, which led to a 43% improvement in conversions to sales opportunities from Q2 to Q3. Q4 conversions are 7% above prior year average

- Oversaw customer and prospect segmentation efforts using Salesforce CRM profiles and data provided by vendors to support targeted marketing campaigns

- Supported development of marketing automation processes for content downloads, form submissions, and email engagements to enhance the customer journey

- Implemented Salesforce campaign attribution models to enable visibility into ROI across marketing lead channels and tactics

- Developed, automated, and delivered 7 Power BI reports supporting sales enablement content, marketing attribution, events, paid media spend, lead and opportunity funnel, email engagement, and web traffic KPIs

- Partnered with Sales analysts to provide consistent, single source-of-truth reporting to the executive team for quarterly board presentations

AMResorts (Apple Leisure Group Company)

Data Steward, Revenue Management | June 2018 – March 2021

- Utilized R libraries (mostly within tidyverse) to transform 500k lines of data, weekly, for import into an Access database to create a self-service data repository to aid corporate reporting analysts

- Created a standard corporate report for the $100 million a year spa revenue stream by joining disparate point-of-sale sources across ~60 servers using SQL
- Built a Qlik Sense dashboard to monitor data hygiene in our property management systems, which successfully identified $150 million in unattributed promotions during the 2019 booking year due to promo code errors
- Identified $300,000 in non-package revenue opportunities by standardizing financial transaction data from ~60 resorts to produce a data pipeline for revenue strategy optimization
- Reduced monthly production report process by 70% by building SQL queries to automate data joins from ~60 servers and Excel macros to automate file splitting
- Managed external relationships with property management and revenue management vendors to resolve integrations challenges

Clarivate Analytics (Formerly Thomson Reuters IP & Science)

Senior Marketing Analyst | November 2017 – June 2018

- Performed UAT to validate marketing data ingestion into a data warehouse environment utilizing Oracle Analytics Cloud
- Partnered with Marketing Operations to deliver a comprehensive data governance and email privacy policy adhering to GDPR guidelines
- Managed and provided direction to intern analysts supporting budget management, marketing attribution, marketing operations, and demand generation reporting rhythm
- Built on-demand Salesforce dashboards and standardized campaign reporting for accounts-based and events marketing teams

Business Intelligence Analyst | April 2016 – November 2017

- Created monthly dashboards to identify new revenue, cross-sell and upsell opportunities, and aid in defining regional sales strategies
- Curated and delivered over 120 standard customer segments based on persona profiles
- Produced a quarterly marketing and sales database to predict retention likelihood of current customers

Thomson Reuters (Financial & Risk)

Market Analyst, US & LatAm Capital Markets | June 2015 – April 2016

- Standardized report specs and increased league table production efficiency by 50%
- Managed the review and creation of methodologies of work for unusual deal structures
- Conducted quarterly competitive intelligence analyses

AWARDS AND ACKNOWLEDGEMENTS

- Employee of the Month
    - AMResorts, September 2019 – for outstanding achievement in analytics innovation
- Orion Star (Employee of the Month)
    - Orion Advisor Solutions, August 2021 – for embodying Orion's core value, "fearless"