

LISA WANGARI KAGENDO

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SUMMARY

Results-driven Financial Analyst with a solid track record in collecting, analysing, and interpreting complex financial data to drive strategic decision-making. Proficient in SQL and Python, with strong capabilities in financial modelling, forecasting, and statistical analysis. Adept at transforming data into actionable insights through dynamic dashboards and reports using Excel, Power BI, Tableau and Fathom. Highly detail-oriented and analytical, with strong problem-solving skills and a commitment to accuracy. Skilled in collaborating with cross-functional teams to identify business needs and deliver efficient, data-backed solutions. Known for clear communication, critical thinking, and supporting operational efficiency and financial transparency.

EDUCATION

Moringa School

Certification in Data Science

Westlands, Nairobi

May. 2022 – Feb 2023

Jomo Kenyatta University of Agriculture and Technology

Bachelors in information technology

Digo road, Mombasa

Current

Jomo Kenyatta University of Agriculture and Technology

Diploma in Information Technology

Digo road, Mombasa

Sep. 2018 – Nov 2020

Blescohouse Girls' High School

Kenya Certificate of Secondary Education

Nakuru

Jan. 2012 – Nov 2015

PROFESSIONAL DEVELOPMENT

Currently pursuing CPA foundation level under KASNEB

TECHNICAL SKILLS

Languages: Python, SQL, R, C++

Ms Office: Excel, Word, PowerPoint, Outlook

Libraries: Pandas, NumPy, TensorFlow, Keras, Pytorch, Scikit-learn, Seaborn

Viz: Tableau, Excel, Power Bi, Fathom

Developer Tools: Git, Sublime Text, GitHub, RStudio, Jupyter Notebook

Accounting: QuickBooks, Hansa, Forecasting, Budgeting, Audit

EXPERIENCE

Financial Analyst
Life Care International Insurance Brokers

January 2024 Current, Nairobi

Achievements

Enhanced Reporting Efficiency: Implemented Power BI integration with QuickBooks, streamlining monthly financial reporting and enabling timely, insight-driven decision-making.

Cross-Departmental Alignment: Aligned finance and commercial figures, reducing data discrepancies by over 90%, fostering consistency and trust in shared reports.

Advanced Strategic Insights: Spearheaded the adoption of Fathom as a financial reporting tool, empowering top management with detailed dashboards, scenario analysis, and accurate forecasting for better strategic decisions.

Responsibilities

- Cleaned and organized financial and operational data, ensuring accuracy and reliability for decision-making.
- Prepared and presented management reports to leadership, providing insights that supported strategic planning.
- Performed bank reconciliations to maintain accurate cash positions and support timely financial reporting.
- Coordinated audit preparations, ensuring compliance with statutory and internal requirements.
- Developed and maintained cashflow reports, enabling effective liquidity and working capital management.
- Utilized Fathom reporting tools to deliver interactive dashboards and performance reports for management.
- Produced financial forecasts and projections, supporting budgeting and long-term planning.
- Created data visualizations using Power BI and Excel to simplify complex financial data for stakeholders.
- Implemented IFRS 16 lease accounting standards, ensuring compliance with reporting requirements.
- Streamlined reporting processes between the commercial and finance teams, improving accuracy and efficiency of financial data.

Data Analyst | Administrative Assistant
Mombasa Total Solutions Limited

July 2022 – December 2023,

Achievements

Elevated Data Precision: Orchestrated initiatives that significantly improved data accuracy, reducing errors by 15% and inconsistencies by 20%, ultimately heightening the reliability of reports and decision-making.

Streamlined Data Analysis with Excel: Implemented advanced Excel functions, including pivot tables, and developed custom templates to expedite data analysis, resulting in quicker insights, reporting, and a 20% reduction in manual effort.

Reporting Accuracy and Problem-Solving: Resolved data discrepancies in financial reports, ensuring compliance and precision, while implementing checks that reduced errors by 15% and boosted stakeholder trust in insights.

Responsibilities

- Extracted, transformed, and loaded data into a centralized database using SQL, ensuring real-time access to critical sales data.
- Utilized Excel and advanced functions for data analysis, providing critical insights and supporting informed decision making.
- Developed and maintained data pipelines, ensuring seamless integration of tech data for analysis and data scraping.
- Performed statistical analysis on tech data to provide data-driven insights that influenced tech strategies and product development.
- Created insightful data visualizations and reports using Tableau, translating complex tech data into actionable insights for tech decision-makers.
- Provided top-notch customer service by promptly addressing tech-related inquiries, resolving technical issues, and assisting with software tool usage.
- Prepared and edited documents, reports, and presentations using Microsoft Office Suite, with a focus on technical content and clarity.
- Collaborated with the sales and IT teams to integrate data from the CRM system, e-commerce platform, and inventory database.

Financial Analyst

V.K. Hirani Suppliers

Feb 2017 – 2021, Mombasa

Achievements

Cost Allocation Accuracy: Introduced an automated cost allocation system, ensuring precise cost attribution to different departments, resulting in more informed budget decisions and resource allocation.

Reduction in Manual Reconciliation: Reduced manual reconciliation efforts by 80% through the implementation of automated reconciliation software, ensuring accuracy and faster financial close processes.

Vendor Payment Efficiency: Automated vendor payment scheduling and invoice processing, resulting in a 40% reduction in late payment penalties and improved vendor relationships.

Streamlined Budgeting Process: Automated the budgeting and forecasting process, reducing the time required to create annual budgets by 50% and improving the accuracy of financial projections.

Responsibilities

- Prepare, examine, and assess financial statements, encompassing income statements, balance sheets, and cash flow statements.
- Develop annual budgets and financial forecasts by leveraging historical data, monitoring market trends, and aligning with company objectives.
- Construct and maintain intricate financial models to aid strategic decision-making, which includes valuations, scenario analysis, and risk assessments.
- Utilize Tableau for crafting visual reports that facilitate performance comparisons between actual results and budgeted targets.
- Evaluate financial modules for functionality, compliance, and precision.
- Collaborate closely with teams during ERP system implementations, ensuring that financial modules align seamlessly with business objectives.
- Coordinate and provide support for both internal and external audits to ensure timely completion.
- Maintain ongoing tax compliance to uphold the organization's adherence to tax regulations.
- Monitor cash flows, ensuring the organization has adequate liquidity to meet its financial obligations.
- Conducted in-depth profitability analysis for an underperforming product line, investigating the root causes of underperformance and identifying key cost drivers.

PROJECTS

Coffee Sales Analysis | Advanced Excel, VLOOKUP, Git

Project

- Utilized historical data from 2019 to 2022 to analyse coffee sales trends over time.
- Demonstrated proficiency in data manipulation and analysis tools, including Excel functions, pivot tables, and charting.
- Identified and ranked the top 5 customers based on their purchase amounts using pivot tables.
- Generated detailed reports showcasing coffee sales trends across multiple countries, including the United States, Ireland, and the United Kingdom.

Sales Analysis | Advanced Excel, VLOOKUP, Excel Add-ins, Power query, Git

Project

- Cleaned and transformed raw sales data for analysis.
- Utilized Excel functions (e.g., VLOOKUP, SUMIFS, Index & Match) for data aggregation.
- Applied a wide range of advanced Excel functions, including VLOOKUP, SUMIFS, INDEX-MATCH, and array formulas, to aggregate and manipulate data.

Auto Inland Claim Insurance Analysis| Python, Pandas, Git

Project

Women in Data, Nairobi Chapter in partnership with Zindi and IBM Research Africa Datathon

- Collaborated with two colleagues to develop a robust machine learning model using XGBoost and LightGBM.
- The model accurately predicted whether customers would submit insurance claims within the next three months.
- Demonstrated exceptional teamwork and technical proficiency, leading the team to victory in the project.

Financial Inclusion| Python, Pandas, Neural Net, Git

Project

- Conducted thorough exploratory data analysis to gain insights and understanding of the dataset.
- Addressed missing values by sorting and managing null values effectively.
- Split the dataset into training and testing sets for model evaluation.
- Performed data normalization to ensure that all variables had the same scale.
- Addressed class imbalance in the dataset using SMOTE.

The primary goal of the project was to predict the likelihood of individuals having or using bank accounts.

REFEREES

Available upon request