

Joseph Yeates

North Vancouver, BC Canada | P: (778) 230-2017 | E: joseph@feathersanalytics.com
LinkedIn: [linkedin.com/in/josephyeates237](https://www.linkedin.com/in/josephyeates237) | Website: www.feathersanalytics.com

Highlights of Qualifications

- Excellent communication skills developed through creating and delivering e-learning content and presenting at technical conferences and user groups throughout North America
- Analytical and creative problem solving honed through experience modeling, manipulating, analyzing, and visualizing data in SQL, Power BI, Excel, R, and Python
- Proficient in leveraging Artificial Intelligence and Generative AI technologies for innovative solutions, including experience with training custom GPT models for specific applications
- Leadership and teamwork skills demonstrated through leading Analytics & Business Intelligence teams and working in cross-functional groups executing enterprise-wide projects
- Committed to continuous professional development, exemplifying a lifelong learning mindset through regular participation in advanced courses, workshops, and conferences

Work Experience

Feathers Analytics

Analytics Consultant & Instructor

Feb 2018 – Present

- Provide both online and on-site training for single or multi-day sessions covering topics of data preparation, analysis and visualization in Power BI, Excel, R, and Python
- Gather and document business and technical requirements, architect and develop business intelligence reporting solutions in SQL, Power BI, and Excel
- Vancouver Power BI User Group Organizer – Featured Speaker and monthly What’s New in Power BI

Corporate Finance Institute

Director, Business Intelligence & Data Analysis

Nov 2022 – Feb 2024

- Utilize extensive industry expertise and technical proficiency to develop engaging, applied learning materials that cater to diverse professional development needs in Business Intelligence and Data Science
- Direct a dynamic team of internal and external Subject Matter Experts (SMEs) to ensure the delivery of high-quality content aligned with organizational goals and industry standards
- Spearhead the launch of innovative content programs, certifications, and specializations, driving the expansion of educational offerings – highlighted by the Power BI Specialization and related learning paths

Subject Matter Expert, Business Intelligence & Data Analysis

Feb 2022 – Oct 2022

- Design and implement innovative content strategies that prioritize learner engagement and retention
- Established as an expert within the program, providing authoritative guidance and resolutions to complex inquiries, enhancing team knowledge and program effectiveness

Senior Financial Analyst, Business Intelligence & Data Analysis

Apr 2021 – Jan 2022

- Design data models, business scenarios, and PowerPoint Presentations that enable our Business Intelligence courses to communicate complex business intelligence skills
- Collaborate with team of Financial Analysts to create scenarios and use cases that align with other courses across Corporate Finance, Capital Markets, Financial Modelling and Credit Analysis

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BlueShore Financial

Advanced Data Analyst

May 2016 – Mar 2021

- Support strategic decision making by creating, curating and communicating data-driven analysis and insights to executive team with Power BI reports, in-person presentations, and internal white papers
- Translate raw data into valuable insights which are actionable and lead to significantly reduced costs, improved operational efficiencies, or enhanced sales
- Create and implement enterprise-wide predictive models in Client Segmentation, Client Engagement, and Client Digital Scorecard
- Research, evaluate, and implement statistical methods for tracking corporate KPIs

Financial Services Associate

May 2012 – May 2016

- Follow established standards and procedures to provide quality service for members by performing a variety of retail member transactions
- Completed training courses on privacy, anti-money laundering, and registered products

Education

Uplimit

Certificate, Analytics Engineering with dbt

Jan 2022 – Apr 2022

- Transform, test, and maintain datasets with a cloud data warehouse using dbt
- Design and deploy a modern data stack, model layers and dbt tests, macros, packages, DAGs, & dbt exposures

British Columbia Institute of Technology

Associate Certificate, Applied Database Administration & Design with Distinction

Jan 2017 – Dec 2018

- Emphasis on Microsoft Business Intelligence Stack and SQL programming

Beedie School of Business, Simon Fraser University

Certificate, Business Analytics & Decision-Making

Sep 2015 – Apr 2016

- Certificate GPA: 3.84

Bachelor of Business Administration (Finance), Honours

Sep 2011 – Apr 2015

- UDGPA: 3.66 - Dean's Honour Roll: 2014 & 2015
- Research & Teaching Assistant: Assist faculty members with practical literature research and data modelling, conducting weekly tutorials, marking assignments and exams

Extracurricular Activities

- An avid runner and podcast consumer having completed multiple half-marathon races
- An early riser on the weekend to watch Liverpool FC
- Vancouver Power BI User Group Organizer – What's New in Power BI, Jul 2016 – Present
- Microsoft Power BI & R Conference Speaker, Oct 2017 – Present
- BlueShore Financial Leadership Development Program, Oct 2019 – Oct 2020
- Coach - West Vancouver Football Club, Aug 2019 – Apr 2021
- President's Dream Colloquium on Engaging Big Data, Jan – Apr 2016