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## Focal – Erik Chen – Account Manager (Mid-level BI Analyst)



Account manager with > 5 and < 10 years of industry experience.

“In finance, small leaks sink large ships.”

### Personal Characteristics

- 23-year old Account Manager from New York, now at JK Enterprises.
- St. John’s University, New York Bachelor of Science in Finance (2002); Microsoft Certified Systems Administrator for Windows 2000; New York City Technical College Majored in Computer Science 1998 – 1999 (Dean’s List)
- Mini resume:
  - Account Manager: Starlink Consolidation Service Inc. Jamaica, NY (2004-2006) - Processed import and export shipments, ensured accuracy of operational data, prepared end month balance sheet, bank reconciliation, income statements, and profit/loss statements
  - Bookkeeper: E.M. International Trading Inc., Brooklyn, NY (2001-2004); Act Express Inc., Brooklyn, NY (2000-2002); YiFeng Marketing Inc., New York, NY (1999-2000); Concept Marketing Inc., Flushing, NY (1998-1999) - Used QuickBooks to oversee supply ordering, account payable and account receivables, maintain/organize data records and supply inventory, balanced daily deposits and processed customer payments, maintained accurate payroll records
  - Finance Intern: Merrill Lynch, New York, NY (1998) - Assisted stockbrokers and consultants with researching investments and collecting data
- Proficient with QuickBooks and MS Office applications.
- Want to make a career change more into the analyst field and to enhance my knowledge in office automation and bring my finance and IT knowledge into this field, as well.

### Work Environment

- JK Enterprises is a large enterprise conglomerate with 300,000 employees.
- Mr. Chen is an account manager and analyst in the financial division of JK, primarily responsible for internal IT accounts.
- Mr. Chen mostly analyses the past and future potential cost effectiveness of various third-party IT contracts.
- Mr. Chen currently works under Mr. McCraig and only really interacts with Mr. McCraig. Occasionally Mr. Chen consults with other analysts merely for troubleshooting the applications they use in their day-to-day operations.

### Goals

- Contribute in a significant way to improving business processes resulting in significant cost savings at JK.
- Gain respect of current senior analyst staff.

### Why this Persona?

- Mr. Chen is a little ‘green’ in the BI Analytics space. He represents a user who may need some coaching or assistance. He’s not quite ‘lowest common denominator’ but he is a realistic example of a novice analyst. But if we can help Mr. Chen succeed and look good, then anyone using our software should be able to do the same. This is what makes him a Primary or Focal persona.