JASON HINSHAW

Business Intelligence Analyst | Data Analyst

Charlotte, NC | 704-905-7503 | JPHinshaw@Hotmail.com | linkedin.com/in/jason-hinshaw12 | Portfolio: https://jason-hinshaw.github.io/index.html

SUMMARY

Business Intelligence Analyst with 6 years of Capital Markets reporting experience, specializing in SQL, Power BI, and ETL pipeline development. Built and maintained the reporting infrastructure for a mortgage capital markets team, from automated data pipelines through executive-facing dashboards. Skilled at translating complex datasets into clear, decision-ready insight for non-technical stakeholders.

TECHNICAL SKILLS

SQL (T-SQL): complex joins, CTEs, window functions, query optimization
Power BI: DAX measures, data modeling, Power Query, executive dashboards, KPI reporting
Python: Pandas, NumPy, Matplotlib, Scikit-learn, Seaborn
Also: Advanced Excel, PostgreSQL, MongoDB, SSMS, Tableau, Git, Jupyter, VS Code, Salesforce, PowerPoint, HTML/CSS

PROFESSIONAL SKILLS

Stakeholder communication • Executive Reporting & Presentation • Cross-Team Collaboration • Workflow Optimization • Analyst Mentorship & Training

EXPERIENCE

Capital Markets Underwriter II — 2024 – 2026

Rocket Mortgage, Remote

- Designed and automated an ETL pipeline (Salesforce → nightly Azure-orchestrated jobs → SQL warehouse), eliminating ~30 minutes/day of manual reporting work.
- Served as reporting and analytics SME for the Capital Markets team — built SQL data models, DAX measures, and Power BI reporting from the ground up.
- Built a suite of sales and partner-performance dashboards (Pipeline, Extension, Padlock, Pinnacle) that surfaced loan-officer and partner trends, reducing extension volume 5–7%.
- Led monthly leadership meetings as primary analytics contact, presenting executive dashboards and ad-hoc findings to support pricing and operational decisions.
- Optimized Power BI model performance, structured refresh schedules in Power BI Service, and configured automated report distribution for reliable, timely reporting.
- Collaborated with cross-functional Capital Markets teams to identify reporting blind spots, gathering requirements and validating data with stakeholders to improve reporting accuracy.
- Mentored teammates on data refreshes, automated distribution, and ad-hoc analysis best practices.

Capital Markets Operations Specialist I & II — 2020 – 2024

Rocket Mortgage, Remote

- Conducted a retail-wide revenue analysis exposing pricing misalignments; built and presented a data-driven pricing framework that improved borrower fairness and revenue consistency.
- Owned ad hoc analysis using SQL, Excel, and Power BI to investigate pricing trends and operational performance, directly informing Capital Markets decisions.
- Troubleshot Qualified Mortgage failures and loan pricing/structure issues, delivering solutions that kept deals on schedule and preserved partner relationships.

Customer Service Representative, Branchserv — 2019 – 2020

Built an Excel-based ticket tracking system that kept technician scheduling within SLA and improved visibility across the team.

Psychosocial Rehabilitation Counselor, Innervision — 2017 – 2018

Point of contact for a rehabilitation program; led psychoeducational groups and one-on-one counseling and supervised paraprofessional staff and interns.

Case Manager, Fellowship Health Resources — 2014 – 2017

Managed a caseload of 20–25 adults, building individualized treatment plans and leading daily psychoeducational groups.

CERTIFICATION & EDUCATION

Data Analytics Bootcamp Certificate — EdX Bootcamp, UNC Charlotte
B.S. in Psychology — Appalachian State University, Boone, NC