

LORENZO MIGUEL BO

DATA ANALYST | EXCEL • SQL • POWER BI

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PROFESSIONAL SUMMARY

Data analyst with a B.S. in Mathematics and experience across insurance, billing, and operations. Skilled in SQL, advanced Excel (VBA, Power Query, Power Pivot, DAX), and Power BI for reporting. Automated 9 recurring reports, cutting the largest from 9 hours to 4. Builds executive-ready dashboards that turn complex data into clear, actionable insights.

EXPERIENCE

AUGUST 2025 - PRESENT

SERVICE DELIVERY ANALYST, RESOURCE PRO (FORMERLY WITH MICROSOURCING PHILIPPINES INC.)

- Support U.S. Property & Casualty insurance underwriting operations across the policy lifecycle, including new submissions, rating/quoting, binding, policy issuance, endorsements, renewals, and ad hoc client requests.
- Develop and maintain client-facing reports, charts, and dashboards, transforming operational and policy data into structured information used by senior stakeholders, including Presidents, Vice Presidents, and Chief Underwriters.
- Automated and optimized 9 recurring weekly and monthly reports using Excel VBA, Power Query, Power Pivot, DAX, and advanced Excel formulas, reducing report handling time by up to 55%; the largest reporting process was reduced from approximately 9 hours to 4 hours per cycle.
- Re-engineered reporting procedures alongside automation initiatives, redesigning data preparation, transformation, calculation, and reporting workflows to reduce repetitive manual work and improve process consistency.
- Create and execute SQL-based reports and templates using AIM Report Manager, extracting and organizing insurance data to support client reporting and operational requirements.
- Perform quality assurance, data validation, process documentation, and analysis, while developing SOPs and training materials and supporting team members in adopting improved processes and reporting workflows.

OCTOBER 2022 – FEBRUARY 2025

CUSTOMER SERVICE REPRESENTATIVE, DME SERVICE SOLUTIONS

- Collected and verified patient information within the New Patient Intake Department, ensuring accurate documentation and adherence to insurance requirements.
- Managed account creation, documentation verification, and order fulfillment processes while coordinating information across the patient intake workflow.
- Answered product inquiries and resolved customer feedback and complaints.

SEPTEMBER 2021 – JULY 2022

CUSTOMER SERVICE SPECIALIST, MOSCORD PTE LTD

- Transformed product and transaction data from multiple customer formats into standardized structures for integration into marketplace and transaction systems.
- Performed data cleaning, validation, mapping, and standardization to improve data consistency and accuracy across customer records and transactions.
- Processed and maintained transactional data throughout the order lifecycle, coordinating with clients and internal teams to resolve data and processing issues.
- Verified customer company information and performed routine data quality checks and data management activities to support accurate system records.

OCTOBER 2019 – JULY 2021

BILLING SPECIALIST, PROVIEW GLOBAL ADMINISTRATION, INC

- Served as temporary Officer-in-Charge (February 2021 - April 2021): prepared weekly utilization and end-of-day client reports, presented status updates in weekly client meetings, and trained new hires.

- Performed premium billing reconciliation and data validation by retrieving, processing, and reconciling carrier invoices against client billing records.
- Used advanced Excel formulas and reconciliation techniques to analyze billing data, identify discrepancies, and verify accurate posting of premium payments across reporting periods.
- Prepared consolidated invoice statements by transforming and consolidating carrier billing information while maintaining accuracy and adherence to client-specific reporting requirements.
- Conducted billing audits and data quality checks, investigating inconsistencies between current invoices, prior-month payments, and client records and coordinating with client counterparts to resolve discrepancies.
- Analyzed transactional billing information to determine appropriate resolution of data issues and communicated findings to clients through email, phone, and conference calls.

JULY 2018 – AUGUST 2019

CUSTOMER SERVICE REPRESENTATIVE, ALORICA PHILIPPINES

- Assisted customers by providing helpful information, resolving customer inquiries and billing issues, setting clear expectations on outcomes, and responding to complaints.

PROJECTS

- **Commercial Insurance Portfolio Analytics Dashboard | Excel, Power Pivot, VBA, Power BI, DAX**
 - Built a four-page dashboard (Overview, Loss Ratio, Hit Ratio, Retention) on a star schema of 6 fact tables and 5 dimensions, covering Package and Workers' Compensation lines with 2025 results benchmarked against 2024.
 - Wrote DAX insight cards with sample-size guards and thresholds calibrated to the actual data distribution, and fixed a retention double-count by unioning accounts in Power Query and deduplicating with DISTINCTCOUNT.
 - Delivered the analysis in both Excel (41 pivot tables, VBA-driven narratives) and Power BI. Built on an anonymized dataset.
- **Philippine CPI & Inflation Analytics Platform | SQL (SQLite), Python, Power BI, DAX**
 - Designed a SQLite star schema (3 dimensions, 5 fact tables) from official PSA files, cleaning encoding errors, duplicate records, and inconsistent date formats, then connected it to Power BI via ODBC.
 - Built a five-page report (Overview, Commodity, Regional, Inflation Drivers, Statistical Analysis) with DAX MoM and YoY measures.
 - Modeled oil price pass-through with OLS regression in Python (Brent crude lagged one month, national $R^2 = 0.40$), finding the strongest sensitivity in transport and in housing, electricity, and gas.

Additional projects and full case studies: lorenzomiguelbo.github.io

TECHNICAL SKILLS

- **Data Analytics:** SQL, Excel, Data Cleaning, Data Validation, Data Reconciliation, Data Transformation, Python (foundational, applied to regression analysis)
- **Business Intelligence:** Power BI, DAX, Power Query, Power Pivot, Dashboard Development, Data Modeling, Data Visualization
- **Automation & Reporting:** Excel VBA, Advanced Excel Formulas, Report Automation, Process Optimization, Executive Reporting
- **Systems:** AIM Report Manager, Applied Epic, ImageRight

CERTIFICATIONS

- Data Analytics Level 1 | Advanced Excel/Data Analysis and Power BI | ExcelHelpline PH
- Data Analytics Level 2 | MySQL | ExcelHelpline PH
- Full Stack Data Analytics | Excel Helpline PH — In Progress

EDUCATION

- Pamantasan ng Lungsod ng Maynila | 2013 – 2019 | Bachelor of Science in Mathematics