

RODOLFO LOPEZ

Financial Planning & Analysis | Business Intelligence (Power BI) | Process Improvement

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PROFESSIONAL SUMMARY

FP&A and business intelligence professional with 8+ years of budget ownership, forecasting, and executive reporting at one of Florida's largest public universities. Manage a \$1.3M operating budget end to end, reconcile 4,000+ transactions a year across enterprise financial systems (Workday, TouchNet), and build the Power BI dashboards leadership uses to run the business. Replace manual workflows with automation, including AI-driven tools in daily production use. Bilingual, English and Spanish (native).

CORE SKILLS

Financial Planning & Analysis: Budget Ownership, Forecasting, Variance Analysis, Reconciliation, Cost Optimization, Revenue Tracking, Procurement, Audit Readiness

Business Intelligence: Power BI (DAX, Data Modeling), Power BI Service Administration (Workspaces, Semantic Models, Refresh, Access), Advanced Excel, KPI Design, Executive Reporting, Reporting Automation, Data Visualization

Enterprise Systems & Automation: Workday (Financials, HRIS), TouchNet, CRM Administration (Handshake), Qualtrics, AI Tools (Claude, ChatGPT), Notion

Process & Leadership: Process Improvement, SOP Development, Vendor & Contract Management, Change Management, Cross-Functional Coordination, Staff Training

PROFESSIONAL EXPERIENCE

Florida Atlantic University, Career Center

Boca Raton, FL

Operations & Analytics Manager

01/2024 - Present

- Own the division's \$1.3M annual operating budget: forecasting, multi-year variance analysis across 90+ spend categories, and resource allocation, reporting financial performance and recommendations directly to AVP-level leadership.
- Built and maintain the real-time Power BI reporting suite for operating and Foundation accounts, reconciling 4,000+ annual transactions across Workday and TouchNet and replacing manual spreadsheets with live spend-vs-budget visibility.
- Administer the unit's Power BI environment end to end (6+ production reports across 3 workspaces): workspace access, semantic models, and scheduled refresh.
- Designed and run the financial tracking for a \$1M statewide internship program: a Power BI and Excel data model monitoring 100+ paid interns across 35 employer partners in 12 Florida cities, covering hours, compensation, and placements.
- Manage revenue reporting for a self-funded events business line: consolidated \$2.3M+ in gross revenue across 117 events and 8 fiscal years into a benchmark dashboard; the unit met or beat its revenue goal in 6 of the past 7 years.
- Serve as embedded finance partner to a second department, presenting revenue and expense status in bi-weekly leadership reviews through a custom Power BI dashboard that replaced manual tracking.
- Built division-level engagement reporting for Student Affairs, consolidating 20,000+ event attendance records across departments into a single interactive report used in annual planning.
- Built an AI-driven email-to-task automation that routes flagged requests into a structured project tracker, capturing 290 of 311 flagged items (93%) and improving follow-through across operations.
- Primary CRM administrator (Handshake): platform configuration, user management, integrations, data integrity, and training for staff on best practices.
- Own procurement and vendor payments end to end, from purchase pre-approval through expense reporting, coordinating contract review and renewals with legal counsel to keep spend compliant and on budget.

Business Operations Manager

02/2019 - 01/2024

- Managed a multi-million-dollar budget, leading financial planning, forecasting, and performance analysis to control costs and optimize resource use.

- Led an account reconciliation initiative that recovered previously untracked revenue, increasing funds available for department priorities.
- Executed process improvements across IT operations, inventory, and expense tracking, reducing overhead and improving workflow efficiency.
- Served as HR operations lead: onboarding, employee records, and Workday (HRIS) training for staff.
- Directed migration to a new enterprise survey and feedback platform, overseeing data migration, process redesign, user training, and reporting enhancements.

Florida Atlantic University, Orientation

Boca Raton, FL

Operations Coordinator

03/2018 - 02/2019

- Managed budgets, financial programs, and process-improvement initiatives, aligning resource use with business goals and driving cost control.
- Coordinated launch and logistics of new programs and events, including vendor relations, contract negotiation, and cross-team execution.

Kanner & Pinaluga, P.A.

Boca Raton, FL

Case Manager

11/2016 - 03/2018

- Managed up to 200 active cases per month in a high-volume private law firm, tracking progress and ensuring compliance with legal requirements and deadlines.
- Developed a standardized case-management process that improved workflow efficiency and team productivity while handling 70+ calls and 150+ emails daily.

EDUCATION & CERTIFICATIONS

Master of Business Administration (M.B.A.), Lynn University, 2015

B.S., Business Administration & Management, Lynn University, 2014

Lean Six Sigma Green Belt, FAU College of Business