

# Jarred Hafler

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## Summary

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As a seasoned Data & Analytics leader with nearly 20 years of financial services experience, I bring a blend of hands-on expertise in data visualization (Tableau, Web, Streamlit), data prep (Tableau Prep, Alteryx, Python), and cloud solutions (Snowflake, BigQuery), paired with strategic leadership of technical teams. My track record showcases robust analytical skills, a customer-focused approach, and a knack for fostering innovation and adaptability within teams. I am ready to leverage my experience in steering data-driven decisions and my familiarity with current trends to contribute to the organization's success.

## Experience

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### Credit Union of Colorado | Denver, CO

#### Data & Analytics Team Manager | 01/2024 - Present

- Manage team of data analysts and ETL developers
- Led transition from on-prem SQL Server to Snowflake
- Collaborate with senior leaders to spearhead enterprise data strategy and governance efforts
- Collaborate with cross functional teams to gather and prioritize data requirements
- Oversee evaluation and implementation of cutting-edge data tools and platforms
- Promote development and governance of AI tools within the team and the organization
- Champion agile practices to enhance project execution efficiency

### Charles Schwab | Lone Tree, CO

#### Senior Manager, Data Analyst | 06/2016 - 01/2024

- Led Client Experience Measurement and Analytics team's BI transition from manual static reports to automated dynamic dashboards leveraging Tableau and Alteryx
- Centralized team's reporting into a custom portal leveraging Tableau's JavaScript API to enable highly customizable and detailed analytics journeys
- Built internal survey reporting to replace six-figure vendor's solution
- Led the transition from legacy Oracle environment to Google Cloud Platform; including working with external vendors and internal technology teams to reduce data processing delays from days to near real-time
- Served as team's data governance steward where I assisted in health monitoring and lineage mapping of critical data elements
- Co-founder and co-leader of Schwab's Tableau and Alteryx User Groups which grew to hundreds of members and were used by Tableau Success Managers as examples for their other customers

### Charles Schwab | Lone Tree, CO

#### Service Quality Analyst | 08/2014 - 06/2016

- Developed retail financial service representatives in collaboration with senior managers and training organization
- Developed tools and process improvements to increase efficiency and efficacy by leveraging data including building speech analytics heat maps, help and guidance trending reports, tenure tracking, Pinnacle & Chairman's Circle Message Database, and an emotional intelligence index

### Charles Schwab | Lone Tree, CO

#### High Net Worth Broker, Pinnacle Team | 09/2011 - 08/2014

- Served as a licensed broker for high net worth client segment, providing guidance and placing trades
- Served as a mentor for new brokers and filled in as acting team manager for retail teams

### Wells Fargo Bank | Greenwood Village, CO

#### Manager | 07/2006 - 08/2011

- Managed teller and banker teams where duties included hiring, scheduling, goal setting, sales coaching, training, compliance management, reporting, project management, and corrective action.
- Provided technical and cultural training to managers in connection with Wachovia merger.
- Developed reporting tools to streamline processes and increase efficiency
- Prior roles include: lead-teller, personal banker, customer service manager, service manager, assistant branch manager

## **Skills**

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FINRA Series 7, 63, 9, & 10 Licenses, Leadership, SQL, T-SQL, NoSQL, Tableau, Alteryx, SAS, Python, Streamlit, AI, LLM, Snowflake, Google Cloud Platform, Azure, HTML, JavaScript, CSS, PHP, Advanced MS Office including PowerQuery and VB Scripting, Linux, Customer service

## **Education**

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**Colorado State University**

**Master's Degree - Project Management**

Specialization in Information Technology

**Colorado State University**

**Bachelor's Degree - Business Management**

Specialization in Information Technology

Certificate in Cyber Security