

# JULIANA OSWALD

*Data Systems & Evaluation Leader | Nonprofit Operations | Bilingual English–Spanish*

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## PROFESSIONAL SUMMARY

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Results-driven data professional with 7+ years of experience designing and managing data systems, ensuring data integrity, and translating complex datasets into actionable insights. Proven track record building CRM workflows, database pipelines, and reporting frameworks across financial and tech sectors. Adept at training cross-functional teams, maintaining compliance protocols, and improving operational efficiency through data-driven solutions. Committed to leveraging technical expertise in service of mission-driven organizations dedicated to equity and survivor-centered care. Bilingual in English and Spanish.

## CORE COMPETENCIES

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**Data Systems & Integrity:** SQL/MongoDB, NetSuite, QuickBooks, Redtail CRM, Excel/Google Sheets

**Reporting & Dashboards:** Data visualization, compliance reporting, funder reporting frameworks, KPI tracking

**Development & Tools:** React, JavaScript, Node.js, Python, Git — enabling custom data tooling and automation

**Leadership & Training:** Cross-functional collaboration, staff training on data protocols, workflow documentation

## HIGHLIGHTED ACHIEVEMENTS

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- ▶ Consolidated client records from 3 disparate sources into a unified Redtail CRM system, reducing data retrieval time by ~40% and eliminating duplicate entries across 500+ accounts.
- ▶ Engineered validation logic and unit tests that measurably reduced UI bug reports and improved data submission accuracy across thousands of daily transactions.
- ▶ Reduced average collection cycle by reorganizing account aging analysis and implementing a structured follow-up protocol, accelerating cash recovery for the AR portfolio."

## PROFESSIONAL EXPERIENCE

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### Software Engineer – Front End

**Intuit** | Mountain View, CA | 2022 – Present

- ▶ Built and maintained data-driven UI components for QuickBooks Payments, ensuring accurate financial data display and submission for a platform processing millions of transactions.
- ▶ Partnered with product managers and backend engineers to define data validation requirements and integrate reporting features aligned with compliance standards.
- ▶ Led unit testing initiatives that improved data accuracy and reduced production defects, applying QA practices transferable to data quality assurance workflows.
- ▶ Developed internal tools using React and JavaScript to automate repetitive data workflows, reducing manual entry errors and freeing team capacity.

### Administrative Assistant

**Lifetime Capital Financial Group** | California | Aug 2020 – May 2022

- ▶ Implemented and restructured Redtail CRM to centralize client data management, creating standardized templates and workflows adopted across the advisory team.
- ▶ Consolidated and cleaned client data from multiple sources, ensuring accuracy and consistency — directly analogous to data quality assurance in nonprofit case management systems.
- ▶ Provided technical support to advisors on CRM usage, developing training guides and 1:1 coaching to improve team adoption and reduce data entry errors.

### Accounts Receivable Specialist

**East Bay Restaurant Supply** | Bay Area, CA | Jan 2019 – Jul 2019

- ▶ Managed payment posting, account reconciliation, and PO approvals while maintaining accurate financial records across a high-volume client portfolio.

- ▶ Analyzed accounts by age and value to prioritize collections outreach, improving recovery timelines through structured follow-up and payment arrangement protocols.

### **Accounts Receivable Specialist**

**Delphon Industries** | Bay Area, CA | Jul 2018 – Dec 2018

- ▶ Resolved billing discrepancies and processed account adjustments, maintaining data integrity across financial records and ensuring timely reporting compliance.

## **EDUCATION & CERTIFICATIONS**

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**B.A. in International Business** — Universidad Cooperativa de Colombia, Bogotá

**Certificate in Full Stack Web Development** — UC Berkeley Extension (2019)

**Certificate in Programming & Software Development** — MinTIC, Colombia (2021)

## **LANGUAGES**

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**English** (Fluent) | **Spanish** (Native)