

Ian Lehrer

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PROFILE

Financial & Operations Analyst with a track record of managing complex enterprise budgets, leading cross-functional initiatives, and building AI-driven automation tools. At HPE, owned a \$400M global facilities portfolio with 99.9% accuracy while developing Python automation that eliminated 20+ hours of manual work monthly. Seeking a role combining financial acumen, project leadership, and hands-on technical building to drive operational impact.

PROFESSIONAL EXPERIENCE

Financial Operations Analyst | *Hewlett Packard Enterprise* Spring, TX | June 2022 – May 2025

- Managed end-to-end financial performance across a \$400M annual facilities budget (250+ global sites), driving 99.9% budget accuracy and earning promotion to expanded operational scope.
- Led a \$30M cross-functional cost optimization initiative—scoping requirements, coordinating stakeholders across finance and vendor teams, and delivering data-driven savings through structured project execution.
- Developed AI-driven forecasting models and Python automation pipelines that streamlined quarterly reporting, cutting 20+ hours of manual effort per month and accelerating close-cycle timelines.
- Designed executive dashboards integrating predictive analytics and scenario modeling to guide real-estate consolidation and capital allocation decisions for senior leadership.
- Created a Value Realization Framework (7 quantitative, 3 qualitative pillars) to measure initiative outcomes—establishing project success criteria across cost avoidance, revenue acceleration, and risk mitigation.

Valuation Analyst Intern | *Capital Insight* Solana Beach, CA | May – Aug 2021

- Supported \$10M–\$100M M&A transactions in food & hospitality, performing in-depth financial statement analysis on revenue, cost structure, and expenses to assess deal viability and growth potential.
- Built and maintained dynamic Excel valuation models to track financial performance, identify trends, and support pricing strategy and capital allocation discussions.

Founder | *Webbify* Dallas, TX | Oct 2018 – Nov 2019

- Founded a web development and digital strategy firm serving small businesses, owning end-to-end delivery from client discovery through launch and optimization.
- Designed and deployed SEO-optimized sites that achieved up to 200%+ increases in organic traffic within 3 months of launch.
- Executed data-driven marketing strategies that improved conversion funnels, customer acquisition efficiency, and measurable client ROI.

KEY PROJECTS

Quarterly Reporting Automation — End-to-end pipeline integrating multiple enterprise data sources, eliminating manual consolidation and reducing reporting cycle risk. (*Python, Pandas, Excel Integration*)

AI-Driven Forecasting Tools — Predictive models translating complex datasets into forward-looking projections for a 250+ site global portfolio. (*Predictive Modeling, Scenario Analysis*)

Value Realization Framework — Structured measurement system enabling leadership to quantify initiative ROI across cost, revenue, efficiency, and risk dimensions. (*Strategy, Financial Modeling, Capital Allocation*)

Baseline Annual Forecast Reinstatement — Project-managed the full initiative lifecycle to reinstate the annual forecast—driving cross-functional alignment across finance, operations, and leadership under rigorous timelines. (*Project Management, Cross-Functional Leadership, Forecasting*)

EDUCATION

University of Arkansas — *B.S. Finance, Minor in Economics* Fayetteville, AR | 2019 – 2022

SKILLS

Technical: Python (Pandas, Automation), Advanced Excel (Modeling, Dashboards, Scenario Analysis), Salesforce, Web Development, Data Visualization

Professional: Project Management, Cross-Functional Leadership, Stakeholder Communication, Executive Presentations, Process Improvement

Domain: Budget Management, Capital Allocation, Cost Optimization, Vendor Performance, AI/Automation Strategy, Real Estate Operations