

# Kenny Soto

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## Education & Certifications

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**The City College of New York - CUNY**  
Bachelor's Degree, 2016

**New York, NY**

**Bloomberg Finance Fundamentals (BFF) - Bloomberg - 2025**

**AI for Finance Specialization – Corporate Finance Institute - 2025**

**AI For Excel Formulas – Corporate Finance Institute - 2025**

**Bookkeeping Certification – Intuit - 2025**

**Lean Six Sigma (Yellow Belt) Project Management Certification – SSGI - 2020**

## Overview

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Analytical professional with 10 years of experience transforming performance data into strategic insights across marketing, insurance, and public sector operations. Background includes budget tracking, financial reporting, KPI analysis, vendor cost management, and process improvement. Proficient in Excel, SQL, Tableau, and CRM systems. Certified in AI for Finance, automation, and bookkeeping with a foundation in accounting principles and operational efficiency.

## Experience

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### Data Analyst

*Alpha Medical Laboratory – Tulsa, OK* | Jan 2026 – Present

- Prepare and analyze financial and operational reports, support variance analysis and business reviews, and partner on cash flow tracking and month-end close activities.
- Manage AR/AP support including daily cash entries and mileage tracking, improving collections and cost visibility.
- Lead multi-state route optimization (OK, MO, AR), using agentic workflows and AI to reducing daily drive time by 6+ hours, improving operational reliability, and projecting 2,000+ annual labor hours saved.
- Manage a fleet of over 100 vehicles, overseeing routing, utilization, and cost efficiency across operations.

### SEO Consultant

*The Church Law Firm (Contract) – USA, Remote* | Nov 2025 – March 2026

- Conducted structured data analysis of website performance metrics to identify traffic trends, technical deficiencies, and optimization opportunities.
- Developed dashboards to track keyword visibility, engagement metrics, and conversion patterns.
- Provided monthly reports with trend analysis and performance recommendations.

### Program Assistant

*City of Tulsa: Financial Empowerment Center – Tulsa, OK* | Jul 2025 – Oct 2025

- Managed grant budgets and vendor contracts, ensuring compliance with public funding requirements.
- Produced monthly program reports for city leadership to support decision-making.
- Developed and implemented systems to track invoices, monitor program spending, and improve budget accuracy across multiple initiatives for the city's financial empowerment centers.

## **Media Buyer**

*Digitality Marketing, LLC (Contract) – USA, Remote* | Nov 2024 – Jun 2025

- Managed and allocated \$90K+ in advertising budgets across eight accounts using performance-based analysis.
- Conducted spend variance analysis and adjusted campaign allocations based on ROI trends.
- Generated forecasting reports to guide future budget planning.

## **Marketing Manager**

*LOOP Car Insurance – Austin, TX* | Apr 2022 – Jun 2024

- Oversaw lifecycle marketing budgets and performance tracking across customer retention initiatives.
- Analyzed churn and revenue data to identify cost-efficiency opportunities, contributing to measurable improvements in retention metrics.
- Supported implementation of AI-driven tools to improve reporting accuracy and workflow automation.

## **Content Marketing Manager**

*Finch – USA, Remote* | Jan 2021 – Feb 2022

- Consolidated campaign performance data into executive-ready weekly KPI reports.
- Evaluated vendor and platform performance to optimize operational efficiency.
- Supported cross-functional teams with structured reporting and performance insights.

## **Media Buyer**

*ProspectBacon, LLC (Contract) – USA, Remote* | Jun 2020 – Jan 2021

- Managed \$20K+ monthly budgets across 12 accounts and reconciled platform spend with finance teams.
- Conducted cost-per-acquisition and spend-efficiency analysis to guide allocation decisions.

## **Account Manager**

*Business Bravery (Contract) – USA, Remote* | Jan 2020 – Jun 2020

- Implemented internal automations that doubled account manager capacity and reduced admin workload.
- Contributed to an 8% increase in annual retention by improving reporting efficiency and data visibility.

## **ESL Teacher**

*First Leap China – Beijing, China* | Apr 2018 – Jan 2020

- Tracked student performance metrics while managing scheduling, instruction, and parent reports.

## **Skills**

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### Financial & Analytical

Budget Monitoring • Variance Analysis • Financial Reporting • KPI Tracking

### Technical

Microsoft Excel • SQL • CRM Systems • Workflow Automation

### Operational

Lean Six Sigma • Cross-Functional Reporting • Compliance Monitoring

*Professional references are available upon request.*