

Isabelle Morgan

Strategy & Data Analyst

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PROFILE

Strategy and data analyst with experience across financial services, retail, and consulting. First Class BSc from the University of Edinburgh. Builds dashboards, scenario models, and reporting systems that help leadership teams understand performance and act on it.

EXPERIENCE

Strategy & Analytics Analyst

Asteria Advisory | London | 2024 - Present

- Built a commercial performance dashboard replacing a manual board slide pack.
- Analysed GBP 3.5M+ in revenue opportunities, identifying underperforming client segments.
- Automated reporting packs with Power Query and VBA, saving 6 hours per month.
- Developed scenario models for pricing and expansion decisions across three client accounts.

Finance & Data Intern

Northbridge Capital | London | 2023 - 2024

- Built Excel models tracking portfolio company performance across revenue, margin, and cash.
- Created dashboards for quarterly reviews; supported due diligence on two investment assessments.

Business Analytics Consultant

University Consulting Project | Edinburgh | 2022 - 2023

- Analysed 200+ product categories; improved forecast accuracy by 22% via seasonality modelling.
- Built a prototype dashboard for weekly sales and inventory reviews.

Commercial Insight Intern

Luma Retail Group | Manchester | Summer 2022

- Produced weekly KPI reports on sales, margin, and category performance for the commercial team.

EDUCATION

BSc Finance & Management, First Class Honours

University of Edinburgh | 2019 - 2022 | Top 10% of cohort

Dissertation: "Using Predictive Analytics to Improve Demand Forecasting in Retail Supply Chains" - awarded distinction, selected for department presentation. Modules include: Corporate Finance, Financial Modelling, Business Analytics, Data Science for Business, Quantitative Methods, Strategic Management.

CERTIFICATIONS

Microsoft Power BI Data Analyst (PL-300)

Microsoft, 2024

CFA Level I

CFA Institute, in progress

Google Data Analytics Certificate

Coursera, 2023

SQL for Data Analysis

DataCamp, 2024

SKILLS

Analytics & BI

Power BI, Tableau, DAX, Power Query, Looker, Data visualisation

Finance

Financial modelling, Budgeting, Forecasting, Variance analysis, KPI reporting, Pricing analysis

Data & Coding

SQL, Python, pandas, VBA, Excel

Strategy

Commercial strategy, Scenario planning, Market analysis, Decision support, Process improvement