Rebecca Lindgren-Ochoa

SENIOR FINANCIAL ANALYST, FP&A | FINANCIAL ANALYST

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SKILLS

Technical: Driver-based forecasting, Financial modeling, Budgeting, Variance analysis, SaaS metrics, Adaptive Planning, NetSuite, SQL, Tableau, Excel, Board reporting, Pricing analysis

CERTIFICATIONS

· CFA Level II candidate

EDUCATION

BBA, Finance
Hill Country State University
2021

PROFESSIONAL SUMMARY

FP&A analyst with five years supporting software and services businesses through budgeting, rolling forecasts and pricing decisions. Owns driver-based models from bookings to cash, partners with sales and operations leaders, and turns ERP and CRM data into reporting executives use. Comfortable in SQL and Adaptive Planning as well as Excel.

PROFESSIONAL EXPERIENCE

Senior Financial Analyst, FP&A Jan 2024 — Present

Bluebonnet Cloud Software · ***Austin, TX***

- Rebuilt the revenue forecast as a driver-based model tied to pipeline, renewals and churn, bringing quarterly forecast error within two points of actuals.
- Owned the annual operating plan for sales and customer success, working with eight budget owners on headcount, quota capacity and program spend.
- Analyzed discounting on multi-year deals and recommended guardrails adopted by the CFO, lifting average realized price on new contracts the next quarter.
- Automated the monthly board KPI pack with SQL queries and Tableau, shortening preparation from four days to one.

Financial Analyst Jul 2021 — Dec 2023

Ridgeway Field Services · ***San Antonio, TX***

- Produced monthly P&L and variance reporting for 12 regional branches, flagging overtime and subcontractor overruns for operations managers.
- Built a branch profitability model that informed the closure of two underperforming locations and the expansion of a third.
- Supported month-end close with accruals, reconciliations and NetSuite journal entries, cutting late adjustments after the books closed.