

SHAUNA KENNEDY

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FINANCE | ACCOUNTING | ANALYSIS | RESEARCH

Analytical professional with experience in financial reporting, research, process improvement, and administrative operations. Skilled in Excel, SQL, data automation, and cross-functional coordination, with a background in healthcare administration, financial report automation, and policy research. Known for learning new systems quickly, improving workflows, and translating complex information into clear, usable reports.

SKILLS

Excel, SQL, Tableau, QuickBooks, Data Analysis, Data Visualization, Report Automation, ETL, Data Entry, Financial Reporting, Research, Process Improvement, Administrative Support, Project Coordination, Cross-Functional Collaboration, Documentation

EDUCATION

Boston University — Bachelor of Arts in Political Science

UMass Lowell — Accounting Certificate, Expected 2027 | GPA: 3.4

Relevant Coursework: Financial Accounting, Managerial Accounting, Database Design and Implementation, Python, SQL, Databases and Data Mining, Quant Reasoning, Geometric Algorithms, Microeconomics, Macroeconomics, Public Policy, Sociology, Political Theory, Ethics

CERTIFICATIONS

Real Estate Salesperson License

PROFESSIONAL EXPERIENCE

Atlantic Primary Care — Administrative Analyst

2019–2021, 2022–Present

- Streamlined scheduling by launching automated text-message appointment confirmations, increasing patient throughput by 10% and saving 30 minutes of staff time daily.
- Processed approximately 100 patient referrals per month, verifying insurance eligibility to ensure accurate submissions, with more than half approved and confirmed on first pass.
- Coordinated with physicians and external providers to support continuity of care and reduce bottlenecks.
- Managed 20–30 patient calls and up to 20 daily payment transactions, reducing billing errors through structured payment and missed-appointment logs.
- Designed and launched an SEO-optimized practice website from scratch, driving approximately 3 new patients weekly while reducing informational call volume and eliminating outside marketing costs.

NEPC, LLC — Research Associate

2021–2022

- Automated client financial report generation using VisionFI, replacing manual data entry and cutting report production time from up to a week down to hours.
- Built and maintained report templates and scripts enabling extensive report packages with minimal input, supporting monthly reporting for 5+ client accounts.
- Led a six-month report automation project, streamlining production of roughly 50-page reporting packets across public equities, fixed income, and alternative asset classes.
- Performed ETL work to extract, transform, and load financial data for recurring reporting needs.
- Collaborated with analysts and marketing stakeholders to ensure reporting reflected accurate performance and asset data
- Incorporated financial data visualization into client-facing reports to support portfolio performance reviews

Suffolk University Public Policy Department — Intern

2018

- Supported research for the “10,000 Souls Project” by analyzing demographic and budget data related to healthcare, social, and economic policy.
- Created time-series datasets to track legislative outcomes against state budgets and identify trends.
- Synthesized complex legislative material into concise briefs for university stakeholders and policy advisors.

Peter Tedeschi Congressional Campaign — Intern

2018

- Supported campaign operations through stakeholder communication, logistics coordination, and policy messaging.
- Managed email and phone correspondence with contributors and constituents.
- Prepared travel arrangements and meeting logistics for campaign travel.
- Drafted talking points and debate preparation materials for speeches and public appearances