

ANDREW MEISENHOLDER

Lead Business Analyst | Process Automation & Digital Solutions

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PROFESSIONAL SUMMARY

A digital architect and strategic program leader who transforms complex Finance ecosystems into intelligent, governed foundations. I design enterprise AI adoption frameworks, build automation platforms, and translate emerging technology into scalable operations- bridging Finance, IT, and executive leadership. My approach pairs systems thinking with disciplined governance: mapping end-to-end workflows, anticipating downstream impacts, and ensuring every solution is auditable, repeatable, and built to scale. I thrive at the intersection of technical depth and organizational influence- building durable solutions that teams trust and leaders invest in.

ROLE HISTORY

Raymond James & Associates / Raymond James Trust Company

Corporate Finance

Lead Business Analyst / Data Scientist III / Project Manager – Data Analytics 2023 – Present

- Founded and operationalized the **Finance AI Enablement program**- authoring the enterprise strategy, governance framework, and operating model spanning **34 AI Champions across 28 business silos**, from executive alignment through applied experimentation.
- Architected and presented a **variance analysis automation framework** to the Chief Accounting Officer- a formula-driven scorecard system with governed LLM-assisted narrative covering **18 financial statement line items**, scalable across 60 business units with zero incremental licensing.
- Established **AI governance standards for regulated Finance operations**- including formal three-way tool evaluation, data residency compliance protocols, prompt library curation with tiered quality controls, and agent lifecycle governance.
- Lead architecture of **governed Finance data layers and automation frameworks** integrating warehouse, SQL, Excel, API, and Alteryx sources to power close processes, reconciliations, and executive reporting.
- Designed a **process solution decision hierarchy** matching determinism, risk profile, and control requirements to the appropriate solution layer- from traditional automation through hybrid AI workflows- ensuring the right tool governs each process stage.
- Managed an automation team that **shortened the post-close reporting schedule by five days in under seven months** through rule-based certification, embedded validation logic, and BlackLine integration.
- Served as **primary technical advisor to Finance executive leadership on AI strategy**- co-preparing CAO/CFO-level briefings, coordinating cross-divisional partnerships, and translating vendor AI roadmaps into actionable investment decisions.
- Led evaluation and curation of a **46-prompt AI library for Corporate Finance**- classifying prompts by transferability and quality tier, authoring Finance-specific rewrites, and establishing prompt engineering as governed intellectual property.

Senior Analyst / Business Process Improvement- Financial Innovation and Tech Solutions 2020 – 2023

- Founding contributor to the **Center of Excellence for Finance Automation**- guided architecture, implementation, and governance of the Alteryx Server environment and established the cross-team Alteryx Designer Forum.
- Designed and deployed a portfolio of **20+ production workflows delivering 2,000+ annual hours of ROI** through automated journal entries, reconciliations, and financial statement tie-outs.

AIS Solutions Specialist / Business Systems Analyst II- Financial Innovation and Tech Solutions

2016 – 2020

- Led enterprise implementation of **BlackLine reconciliation modules for 180+ users and 8,500+ accounts**- instituting the firm's first centralized close-automation platform.
- Core member of the **PeopleSoft GL Implementation Team**; directed ledger-report design, testing, and migration during 18-month Phase I go-live.

Accountant I → Accountant III- Corporate Financial Reporting

2005 – 2016

PROJECT HISTORY

Data Architecture & Intelligent Automation

Variance Analysis Pipeline- Architected a four-stage pipeline (OneStream → OFSAA → Alteryx Server → Excel) producing a formula-driven scorecard with governed LLM-assisted narrative, configurable scoring weights, and append-only audit history scalable across 60 business units.

The pipeline transforms raw consolidation data into executive-ready scorecards without manual intervention, covering 18 financial statement line items with opt-in AI commentary that is logged, reviewed, and deterministically anchored before any model-generated narrative is surfaced.

Data Integration Architecture- Integrated SQL warehouses, Excel extracts, data lakes, and API feeds via Alteryx to drive Tableau dashboards with auditable lineage and automated refresh cycles.

Saved 200+ hours annually while delivering near-flawless reports hours earlier.

CDSPD Data Migration Architecture- Designed the Alteryx integration architecture for the Panther-to-Lighthouse (CDSPD) data migration at RJ Trust- mapping accounts-by-FA to employee-level metrics using split-percentage allocation, responsible-party flagging, and sub-FA rollup logic to ensure accurate AUM and account-count reporting across the new platform.

Produced an IT-facing technical breakdown of both legacy and target Alteryx process containers, enabling the infrastructure team to scope migration without reverse-engineering production workflows.

Financial Reconciliation & Control Modernization

AR-to-Ledger Reconciliation- Automated AR-to-ledger reconciliation within Alteryx by integrating billing, pricing, and account data within 1% tolerance; replaced manual variance reviews with exception reporting.

Maintained automation for three pricing models and advisor-driven fee bundling, preserving a hallmark of advisor autonomy while managing high structural complexity. Built a filter-based scaffold routing each account through dedicated rule sets for every fee permutation, applying thirteen variance checks across the full population. Automation reduced the 12-hour manual review to minutes- ensuring all accounts reconcile within the 40-hour production window. Automation transformed a quarterly review into a monthly control process, elevating accuracy and exceeding compliance standards across all accounts.

Tax-Reconciliation Automation- Built tax-reconciliation automation via Alteryx batch macros applying 70+ business rules across thousands of accounts with continuous compliance tracking.

A business-managed template consists of seventy rows across eleven fields. The Alteryx process checks each account across these seventy defined rules to determine the specific match. Unmatched accounts are reviewed and mapped via override by business users. Previously completed manually by seasonal staff before tax deadlines, the new automation eliminates that temporary labor dependency while enabling continuous compliance monitoring.

Journal Entry Automation POC- Designed and delivered a journal entry automation proof-of-concept in Excel using Power Query and Office Scripts- auto-applying debit/credit signing, producing 16 properly split export files with balance checks- demonstrating that the right solution layer is not always the most advanced tool.

Applied the process solution decision hierarchy in practice: the automation required no Alteryx licensing, ran natively in the user's environment, and was immediately adoptable by the business team- validating the principle that deterministic, low-complexity processes belong in the simplest capable platform.

AI Workflow Design, Context Engineering & Operational Adoption

Context Engineering Demo- Demonstrated Context Engineering of a live Finance process to generate a production-ready Alteryx workflow via ChatGPT- capturing live workflow context via Advanced Voice, synthesizing a single-shot master prompt, and iteratively refining outputs to produce a fully functional Alteryx workflow (.yxmd), technical guide, and executive overview.

The demo replicated an 18-month pre-Alteryx project in just eight hours, including video documentation. Presented to internal analytics communities and Alteryx's Customer Success team to demystify model behavior and accelerate experimentation across Finance.

Two-Stage AI Agent Architecture- Architected a two-stage AI agent system separating deterministic style enforcement from editorial judgment- a Stage 1 Style Converter GPT enforcing brand standards, layout rules, and font compliance, followed by a Stage 2 Polish Agent applying professional editorial refinement without altering governed elements.

The architecture establishes a reusable pattern for multi-agent Finance workflows: each stage owns a defined scope, passes structured handoff context to the next, and maintains audit traceability- preventing the common failure of treating AI as a single monolithic step.

AI-Assisted Process QA- Led AI-assisted process QA for complex multi-workflow Alteryx systems- using full workflow context to isolate high-risk technical and business-rule issues faster than manual review, identifying and remediating a Python ingestion risk that could silently load incorrect data after user file edits.

Built a repeatable QA framework for geocode-match exceptions by applying address normalization, similarity scoring, and risk classification- reducing a broad exception population to a focused set of auditable records. Recorded and presented the methodology as an external-facing demo to Alteryx's CSM community.

Process Solution Decision Framework- Authored a six-step process solution decision framework- Worth Automating? Where Does It Live? What Type of Work? How Precise? Review vs. Redo? How Complex?- applied across active projects to match each process stage to its appropriate solution layer, from native Excel through hybrid AI orchestration.

The framework prevents the common organizational failure of defaulting to AI for every use case by requiring explicit evaluation of determinism, risk profile, and control requirements before selecting a solution- ensuring governed, right-sized automation at every level.

Staged Orchestration Framework- Advanced the framework toward staged orchestration using iterative macros, confidence scoring, and exception routing to separate probabilistic AI interpretation from deterministic control logic in high-accuracy Finance workflows.

The process begins with recording a Zoom Cloud walkthrough to capture the complete workflow context. By pairing the session transcript with Alteryx .xml files and sample inputs, ChatGPT reconstructs the same analytical foundation a human process designer would use. GPT then iteratively refines its understanding- aligning transcript insights with tool-level metadata- to generate in-workflow annotations and coherent, container-based process narratives directly within Alteryx. The final output is delivered in a standardized .docx template, maintaining documentation continuity while reducing authoring time from seven hours to under one. The next phase aims to enable Alteryx as an agent orchestrator, using iterative macros and confidence scoring to automate each refinement stage within a governed, high-accuracy framework.

EDUCATION & CERTIFICATIONS

B.S. Finance & B.S. Business (Accounting Minor)- University of South Florida

Alteryx Designer Core Certification • BlackLine Certified Financial Close Administrator