

# TALIA CAO, CPA

(Full legal name: Ngoc Da Thao CAO)

DATA-DRIVEN | PROBLEM SOLVING | TRANSFORMATION

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## SUMMARY

Finance & Business Intelligence Consultant and CPA-qualified accountant with 6+ years of experience developing data-driven solutions across financial modelling, data analytics and process automation. A curious and proactive problem solver delivering 60+ consulting projects across 10+ industries globally, including government, banking, real estate, pharmacy, education and retail. Combining commercial insight, technical capability and problem-solving to improve decision-making and operational efficiency. Pursuing an MBA to enhance leadership skills to develop high-performing teams and drive data-informed organisational transformations. Seeking to contribute strategic finance, analytics and transformation expertise in a high-impact consulting or commercial role.

## CORE EXPERTISE & TECHNICAL SKILLS

- **Financial Modelling:** Best-practice three-statement models, budgeting and forecasting, project finance, scenario, variance analysis, consolidated statutory financial statements, management reports, valuations and operational models
- **Business Intelligence:** Data analytics and dynamic Excel/Power BI dashboards
- **Process Improvement:** Reporting and process automation
- **Consulting:** problem solving, critical thinking, project management, presentation skills
- **Excel:** PivotTables, Dynamic Arrays, Power Query, Power Pivot, VBA, Office Scripts
- **Power BI:** M language, DAX, ETL, data modelling, visualisation
- **Power Platform:** Power Automate (cloud and desktop flows, AI Builder), Power Apps (Solutions, Dataverse, Dynamics 365, Power Fx)
- **SQL:** Subqueries, joins, window functions, CTEs
- **Accounting systems:** MYOB, Xero, NetSuite, SAP, BGL360

## PROFESSIONAL EXPERIENCE

### Manager – Finance & Business Intelligence Consultant | SumProduct

Sydney, NSW, Australia | August 2021 – Present

*A training and business consultancy firm, specialising in Excel, Power BI, financial modelling, strategic decision-making and valuations.*

- Promoted from Analyst to Senior Analyst (January 2022) within the first four months and to Manager (December 2022) in the next year
- Lead consulting projects for SMEs and large corporates globally, build relationships with C-suite to team leaders while overseeing project schedules and budgets, persuading and training stakeholders across diverse departments and cultures to adopt new solutions
- Manage teams of four analysts/senior analysts, delegate tasks, provide mentorship to develop their consulting and technical capabilities and review work to ensure high-quality deliverables
- Create best-practice financial models and automated reporting solutions, reducing client reporting time by up to 95% and saving hundreds of hours monthly
- Conduct model audits, identifying critical and potential calculation errors for client models

- Build Power BI reports, manage Dataverse/Dynamics 365 CRM database and Power Apps solutions, prepare documentation, provide consultation sessions on contract secondments such as NAB (Nov 2022 to Sep 2023) and Glencore Australia (Aug 2024 to Apr 2025)
- Design company-wide Modelling Best Practice Guide and facilitate internal training sessions, improving model quality and consistency across the company
- Present at [Excel Virtually Global](#) conferences annually, reaching audience of 5,000+ professionals globally
- Co-author of Excel challenge blog series called [Final Friday Fix & Monday Morning Mulling](#)

### Junior Accountant | PetO Australia

Brookvale, NSW, Australia | June 2020 – August 2021

Australia's largest independent pet retailer that runs nearly 60 stores and 25 co-located veterinary clinics selling products & services for pets.

- Automated ordering processes using VBA and Power Query, reducing weekly workload by 30% and improving inventory accuracy
- Created near-real-time dashboards for inventory, sales, customer and store performance analysis by connecting Excel directly to SQL database and e-commerce APIs
- Coordinated 300+ weekly purchase orders for 10+ retail stores, built supplier relationships, resolved delivery issues, identified risks and established inventory control procedures
- Reconciled supplier invoices against goods receipts weekly, recovering \$50,000+ in FY21 due to supply errors
- Dealt with accounts receivable, accounts payable and month-end close processes

## QUALIFICATIONS

### AGSM Master of Business Administration (MBA)

UNSW Sydney, NSW, Australia | February 2026 – Present

### CPA Australia (Certified Practising Accountant)

NSW, Australia | January 2021 – December 2023 | Membership from 2023 – Present

### Bachelor of Commerce – Professional Accounting

Macquarie University, NSW, Australia | February 2018 – April 2020

### Bachelor of Business Administration – Majoring in Accounting

International School of Business (ISB) @ UEH, Vietnam | September 2016 – December 2017

## PERSONAL PROJECTS

- [AGSM Timetable](#): MBA course planner in Power BI
- [Vietnam Shape Map](#): Geographical visualisation for Vietnam's 34 provinces/cities in Power BI

## ADDITIONAL INFORMATION

- **Certifications:** Microsoft Certified: Power BI Data Analyst Associate (PL-300) and Fabric Analytics Engineer Associate (DP-600)
- **Languages:** English (fluent), Vietnamese (native), Japanese (elementary)

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References are available on request