

Finance Data Stack Architecture

How I connect accounting reality to operating dashboards.

Context: dashboards matter when definitions, ownership, and accounting reality are tied together.

The Thesis

- A data stack is only useful if it changes decisions and ties back to finance reality.
- Pretty dashboards are dangerous when nobody owns definitions or reconciliation back to cash/accounting.

What I Actually Built Around

- Accounting and money movement: QBO, Bill.com, Rho, Stripe, PayPal, Wise, Coinbase Prime, Safe/Gnosis, and supporting exports.
- Operating data: Shopify, subscriptions, product usage, logistics, inventory, marketing, support, Mixpanel-style events, and backend/fact tables.
- Warehouse/reporting layer: BigQuery, Fivetran, Looker/Looker Studio, Metabase, SQL, sheets where people insisted on sheets, and documented metric definitions.

Dashboard Families

- CEO/CFO: cash, runway, burn, revenue, margin, headcount, risks, decisions.
- Growth/product: connected vehicles, app conversion, retention/churn, attribution, lifecycle conversion, marketplace activity.
- Finance/ops: close status, variance, AP/AR, vendor spend, inventory/logistics, subscriptions, tax and compliance trackers.

Evidence I Can Discuss

- My internal work included reporting needs, Looker/BigQuery/Fivetran/Mixpanel-style discussions, churn definitions, connected vehicle KPIs, attribution, weekly data syncs, cash/accrual reporting, and dashboard planning.
- I am not publishing internal dashboard screenshots unless they are redacted enough to be harmless.

Public version: methodology and judgment only. I can walk through examples live; raw company files stay private.