### Case Study

### General Instructions

* Developing and delivering executive level presentations is critical to successfully performing this role. The purpose of this exercise is to consistently and carefully assess the relevant skills for each applicant.
* You will develop your Oral Presentation based on the information provided below under “Presentation Scenario Description”.
* Please send your presentation materials back to your Evalueserve HR contact max. 48 hours after receiving the Email with this Case Study.
* This presentation will be conducted via teleconference for all candidates in order to simulate a typical presentation scenario.
* You will have **15 minutes** to deliver your presentation to the panel. Be sure to keep track of your own time and plan accordingly. No time will be permitted beyond the **15-minute** window.
* The panel will ask you questions at the conclusion of your presentation.

### Your Role and Task

* You are an Analytics Consultant.
* A critical part of the Analytics Consultant role is to develop executive level presentations and turn data and analytics into visual effects that tell a story and can easily be understood by business partners.
* In addition to the delivery of the Oral Presentation, the quality of your presentation materials will be evaluated.

### Presentation Scenario Description

* **Audience:** Senior Management
* **Topic or core idea:** Our company´s vision is *“We want to satisfy our customers´ financial needs and help them succeed financially”.* There are many ways to satisfy that vision through successful relationships, which improve our customer’s financial standing, increase loyalty, and deepen our relationship with our customers. You have been asked by senior management to analyze the provided dataset and develop a story around our company vision. Since this is an executive audience, please prepare a professional presentation that summarizes your findings and presents the data in a **clear and concise manner** while providing the relevant detail.
* **Context:** A dataset (*Attachment A – Case Study)* has been provided with metadata to describe the contents of the file. There will potentially be missing/ null/ inaccurate data since this is a hypothetical dataset. Please approach this as if you were already in the role and asked to do an analysis.

Information relevant to the dataset:

* + Tab 1: Population for Analysis at Starting Time Period
  + Tab 2: Population One Year Later
  + Tab 3: Metadata

**Additional information:**

* A PowerPoint presentation is not required but suggested.
* If you plan to utilize other materials for your presentation, they must have the capability to be viewed and shared electronically.
* You will have 15 minutes to present your content, followed by 15 minutes of Q&A.
* There is no completely “right answer”, this is simply our way of understanding how you think through a problem, manage data and communicate what you find.