**THE COMPANY**

RSM US LLP, the nation’s leading provider of audit, tax and consulting services focused on the middle market, is the U.S. member of RSM International, a global network of independent audit, tax and consulting firms with more than 51,000 people in over 120 countries.

RSM’s purpose is to deliver the power of being understood to our clients, colleagues and communities through world-class audit, tax and consulting services focused on middle market businesses. The clients we serve are the engine of global commerce and economic growth, and we are focused on developing leading professionals and services to meet their evolving needs in today’s ever-changing business environment.

**THE OBJECTIVE**

The COVID-19 pandemic has brought unprecedented change to how companies of all sizes operate, and virtual tools have helped fill the gap left by an inability to meet with clients and colleagues. The savings on travel expenses during this time were significant, but the value of real, personal interactions has been missed.

Now that travel has started up again, RSM is eager to gather Associate, Senior Associate, and Supervisor -level tax professionals together to renew working relationships, meet new colleagues hired during the pandemic, and learn about the firm’s strategy.

Bringing such a large group of individuals together is no small feat. It requires a facility large enough to host the group, direct travel expenses, and the opportunity cost of client service time lost for the travel.

It’s a one-day event that could be arranged in a single day or split between an afternoon and a morning.

**Your task is to identify 3 options for the conference and provide your reasoning for recommending each option. (Feel free to be creative! You don’t have to stick to the “least cost” option)**

We will provide you with details for each individual:

* Home office city
* Staff level
* Hourly client bill rate
* Whether or not the individual is attending the conference as a presenter

Also, we will provide a list of hotel facilities that can accommodate our conference population and space needs.

Lastly, we have provided airline flight data between major cities with times of flights and average cost.

**THE SCOPE**

***Time***

Time is the most finite resource of all. We want to minimize time away from revenue-generating work while not expecting our people to travel in the middle of the night.

***Travel Cost***

The sum of all individual travel costs to get from each individual’s home to the conference location.

***Facility Cost***

The cost of the conference facility itself and catering.

**MODEL ASSESSMENT CRITERIA**

The judges will score your model on the following criteria:

* Accuracy:
  + How accurate and mathematically sound is the model?
  + How valid is the model compared to test sets?
* Insights:
  + Can we use the model to help make better decisions?
  + Are the data source(s) used well justified?
* Creativity:
  + Is the model unique and innovative?
  + Does the model harness other technology, datasets, APIs, etc.?

**PRESENTATION ASSESSMENT CRITERIA**

You will have 5 minutes to present and 5 minutes for Q&A – 10 minutes in total. Your presentation will be assessed on the following criteria:

* Problem Solving Approach:
  + What was your thought process for solving the problem?
  + Why did you solve the problem the way that you did?
* Process:
  + What was the process for building the model?
  + What data sources and algorithms did you use?
* Insights:
  + What were the key insights gained?
  + Why are the insights gathered important?
* Demo:
  + How does the model work?
  + How was Alteryx used in your solution?
* Organization:
  + Is the presentation well-organized – both slides and delivery?

**FOLLOW THESE STEPS**

1. Filter for only Associates, Senior Associates, Supervisors, and any Presenters
   1. Assume 85% of Associates, Senior Associates, and Supervisors will be able to attend
   2. Assume 99% of Presenters will be able to attend
2. Join the different reference data files using key fields from each file
   1. Conference Center Data
   2. RSM US Tax People
   3. Office Locations
   4. Airport Data
3. Calculate expected total cost for each potential venue
   1. Factor in airline/travel costs, hotel costs, catering costs, and bill rates of all attendees
   2. *\*Discounted Price of hotel rooms kicks in if a venue achieves at least 75% maximum occupancy*
4. Calculate travel time to each potential venue for each employee
5. Provide 3 recommendations of where to hold the conference and provide reasoning for each recommendation
   1. Keep in mind both quantitative and qualitative data from the exercise
      1. Quantitative will be calculated from the workflow data
      2. Qualitative data could be any other personal reason you have to choose one city over another.
   2. We expect at a minimum to see total cost of each recommendation
   3. Be creative! The location recommendation does not have to be solely on cost.