What We Will Cover Today

1. Who is Qatalyst?

2. Why Qatalyst Made AI a Priority

3. How Qatalyst Uses AI

4. AI Tool Examples

5. How We Validate the Data

6. How We Maintain Data Privacy

7. Key Lessons and Takeaways

Who is Qatalyst?

Qatalyst is a leader in incorporating AI in management consulting.

- **Started:** May 2020
- **Location:** Based in Vancouver with staff across Canada
- **Primary Market**: Canada and extending internationally
- **Staffing**: 20 staff and 200+ registered associates
- **Growth**: Over 40% annually
- **Business Lines:**
  - Impact Measurement & Management
  - Evaluation & Performance Measurement
  - Strategy & Planning
  - Social Finance
  - Innovation & Technology

Why Qatalyst Made AI a Priority

- Technology is a critical part of our business model

- AI will disrupt the consulting industry with new processes and efficiency

- AI tools are effective and produce better results for our clients

- AI provides a competitive advantage but does not level the playing field

- AI requires specialized skills to effectively adopt

How Qatalyst Uses AI

Sales
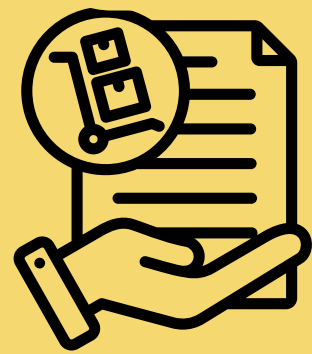
RFP
Harvesting

RFP
Filtering

Proposal
Generation

Research

Transcript
Analyzer

Survey
Analyzer

Literature
Review

We have built our own AI tools to start automating our sales and research process, including summarizing data and reporting results.

- RFP Harvesting and Filtering
- Proposal Generation
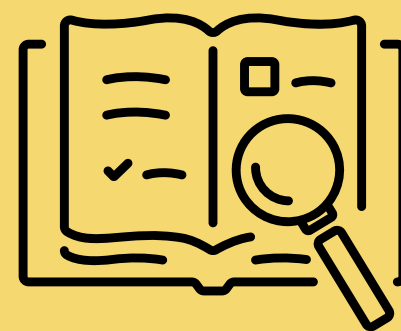- Literature Review Tool
- Transcript Analyzer
- Survey Analyzer

Our tools produce outputs such as thematic analysis and preliminary writeups.

AI Tool Examples

- **Tool 1**: Transcript Analyzer

- **Tool 2**: Survey Analyzer

Tool 1: Transcript Analyzer

cleaned transcript

summary

Q A

responses to questions

transcript

- Cleans transcript
- Summarizes transcript
- Performs thematic analysis
  - in summary bullets
  - supported by verbatim quotes
  - linked to specific respondents and comments
- Identifies responses to specific questions from the guide as well as additional follow-up questions
- Exports text to Excel by respondent and question

Tool 1: Transcript Analyzer

Key Informant Interviews

Input

1. Upload Transcript

Upload transcript (.docx)

Line of Evidence

Key Informant Interview

2. Define Custom Context

The AI tool pulls data from the project and transcript contexts on every run. If this run requires additional context, enter it here.

3. Find and Replace

Find	**Replace**	Remove all
Reilly Baldwin	Interviewer
John Smith	Respondent

+ Add Replacement

✦ Clean Transcript

Cleaned Transcript

Review the cleaned transcript and make any necessary corrections.

[Reilly Baldwin]
How do we use AI? You can divide it up in a number of different ways. We categorize it into occasional tasks versus automated processes. For occasional tasks, these are things you do at your desk as needed.

[Dylan Weicker]
Microsoft Copilot is expensive, about $450 a year, and we're still evaluating its utility. Perplexity is another useful tool, a different kind of search engine for specific questions.

[Reilly Baldwin]
For automating processes, we identify recurring tasks and figure out how to automate them. We've focused heavily on our sales process and production. We've done parallel analysis to compare old and new methods, improving our scripts continuously.

[Dylan Weicker]
For literature reviews, AI is handy for quick information and summarizing PDFs, but not for in-depth reviews. We're also exploring AI for image, video, and PowerPoint generation.

[Reilly Baldwin]
Automated processing involves breaking down recurring processes into steps and figuring out where AI can help. We develop reusable scripts, test, and refine them continuously. For example, in sales, we respond to requests for proposals more efficiently using AI.
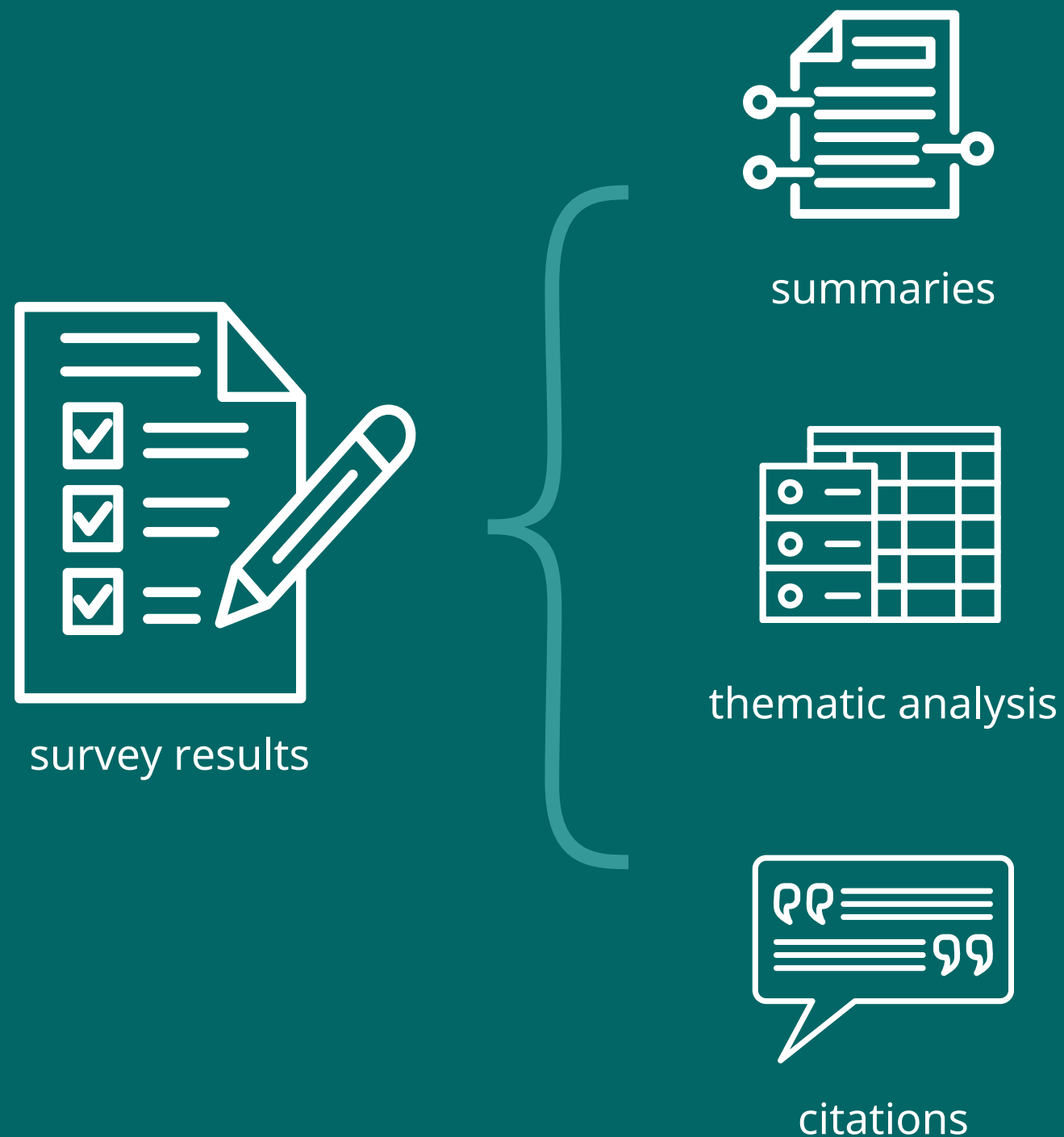
💾 Save   ⬇ Export

Summary

Theme Analysis

Tool 2: Survey Analyzer

survey results

summaries

thematic analysis

citations

The Survey Analyzer takes a spreadsheet of closed and open-ended responses and for each question produces:

- Summaries of the responses supported by vertbatim quotes linked to specific respondents
- Thematic analysis for open-ended questions
- Tables showing the number of responses matching each answer or theme
- A citation of how each respondent was coded

The tool has the ability to select a subset of questions and filter rows based on the responses to specific questions.

Tool 2: Survey Analyzer

3. Select Questions

Select a row to summarize themes for that question. Expand the row to predefine the desired themes.

	ID	Question	Type
☐	1	Name	close-ended ▼
☐	2	Email	close-ended ▼
☐	3	Phone Number	close-ended ▼
☐	4	City	close-ended ▼
☑	5	What are the biggest challenges currently facing your organization? How have these challenges evolved over the past few years?	open-ended ▼
☑	6	Can you describe the most significant changes in your industry/sector over the past 5-10 years? What do you foresee as emerging trends or disruptions?	open-ended ▼
☑	7	What do you believe are the primary strengths and unique advantages of your organization or region?	open-ended ▼
☑	8	What are the most critical areas where your organization/sector could improve to enhance performance and achieve its goals?	open-ended ▼
☑	9	How would you evaluate the effectiveness of current partnerships and collaborations? What opportunities exist for strengthening these partnerships?	open-ended ▼
☑	10	What strategies have you found most effective for addressing workforce or infrastructure challenges?	open-ended ▼

Rows per page: 10 ▼   1-10 of 14   ‹ ›

4. Filter Rows

    + Add Filter

Rows selected: 20 / 20

5. Limit Themes

☑ Limit coding to 3 - 8 themes for open-ended responses.

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20

✦ Summarize Themes

Output

1. **What are the biggest challenges currently facing your organization? How have these challenges evolved over the past few years?**

Respondents highlighted challenges such as adapting to remote work, maintaining talent pipelines, balancing costs with quality, and intensified competition. Over the years, these challenges have evolved to include sustaining productivity, meeting changing employee expectations, managing rising operational costs, and proving value to clients. Additionally, there is a growing emphasis on technological advancements, client retention, regulatory compliance, and the need for data-driven decision-making and holistic solutions.

Table

Themes	#	%
Talent Management	5	25%
Client Engagement and Retention	4	20%
Technological Advancements	3	15%
Market Competition	2	10%
Operational Challenges	2	10%
Total Responding	**20**	**100%**

*Responses are not mutually exclusive, therefore will not sum to 100%

Theme Explanations
Talent Management (2, 10, 13, 17, 18)
This theme refers to the challenges related to attracting, retaining, and managing skilled employees within the organization. For example, respondent (2) expressed struggling with maintaining a strong talent pipeline and the increased competition for skilled consultants. Respondent (10) mentioned the challenge of talent retention, particularly with the rise of the gig

How We Validate the Data
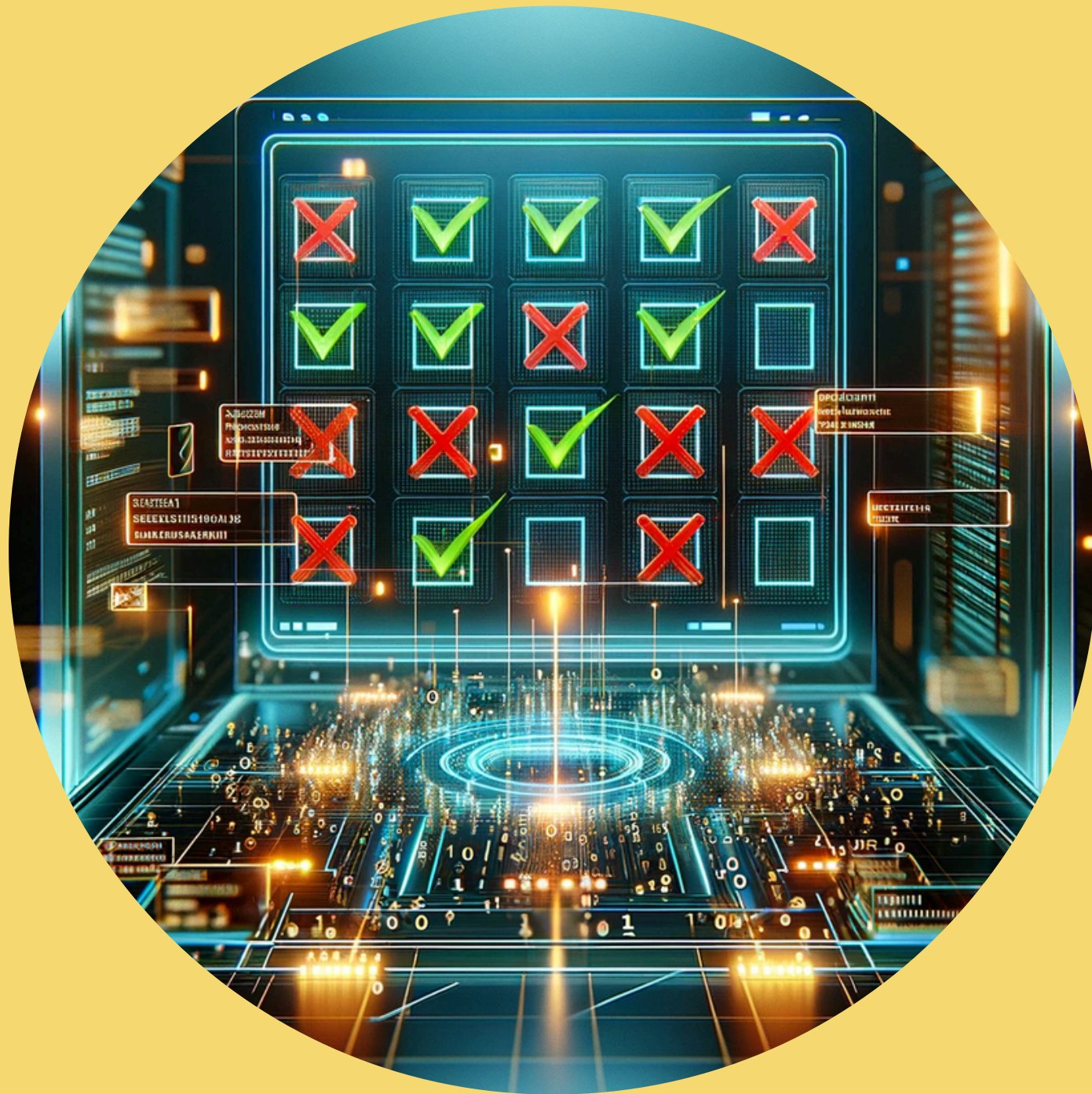
How can we trust the data from our AI tools?

- Break the tasks into a series of sub-tasks
- Validate at each step in the process (and adjust the prompts as necessary)
- Have knowledgeable humans involved through the process
- Generate a range of different types of outputs that we can review and compare
- Know your data / control your data
- Follow-up with specific questions
- Each tool produces citations of the data to provide easier access to validation

How We Maintain Data Privacy

Primary (research) data tends to have the most significant privacy concerns. To mitigate risks, we:

- Tailor our use of these tools to the requirements of the clients and the sensitivity of the data
- Ensure that clients and readers are informed
- Strip out personal information before using AI
- Use business APIs for primary or private data, which keeps it private and does not use it for training.
- Understand how and where the server stores the information
- Actively manage files on those servers
- Control access to and otherwise protect the data on our own systems

Learnings and Takeaways

- AI helps clean, organize and present information through structured process faster.
- The use of AI can be a competitive advantage.
- AI is a prediction technology without clear confidence measures.
- Prompt engineering requires a lot of testing
- Data validation is essential at every step.
- Privacy and security are at the core of the AI tools Qatalyst develops.
- AI tool development is a continuous learning and adjustment process.

How can you make changes to your current processes to allow you to adopt AI?

Q & A