

# Adopting Al: It's Time To Get Onboard

February 22, 2024



#### What We Will Cover Today

- 1. What is Qatalyst?
- 2. Why Have We Made AI Our Priority?
- 3. The Two Main Ways We Are Using AI
- 4. What is Our Medium-term Strategy for AI?
- 5. What Have We Learned?
- 6. How Do We Validate?
- 7. How Do We Maintain Data Privacy?



# 1. WHAT IS QATALYST?



### WHAT IS QATALYST?



- Started: May 2020
- Strategy and Innovation
- internationally
- country
- Growth: Over 40% per year

• Business Lines: Evaluation, IMM, Social Finance,

• **Primary Market**: Canada but now extending

• **Location**: Based in Vancouver but staff across the

• **Staffing**: 20 staff and 200 registered associates

# **OVERVIEW OF OUR BUSINESS MODEL**

Our model means better results for our clients.



#### **Our Model**

- expertise they need
- implementation and evaluation of results
- our associates

Connects clients with teams containing the specified

• Supports those consulting teams with leading-edge tools, technologies, management, and research capabilities

• Can offer a full-range of services all along the continuum from strategy, development, program design,

• Creates opportunities for us to scale operations, enter new verticals and regions, and market our services to and through

# 2. WHY HAVE WE MADE AI OUR PRIORITY?



### WHY HAVE WE MADE AI A PRIORITY?



- AI will disrupt the consulting industry
- AI does not level the playing field
- We need to understand it to grow with it
- It works
- AI gets more powerful every month

#### • Technology is a critical part of our business model

# 3. THE TWO MAIN WAYS WE ARE USING AI



**A**[///]

# THE TWO MAIN WAYS WE ARE USING AI

#### **Occasional Tasks**

For occasional tasks, we use pre-packaged solutions such as:

- ChatGPT (Chat-based AI)
- MidJourney (Image generation)
- Invideo AI (Video generation)
- Microsoft Co-Pilot (Office 365 integration)
- Perplexity

### **Automating Processes**

For frequent processes, we automate recurring functions using apps that we build:

This includes:

• Automating our sales process, from finding **RFPs to writing proprosals** 

• Automating our production (mostly research) process, from developing questionnaires to summarizing data and reporting results

You HE)



qatalyst-use-cases-of-generative-ai.pdf

Can you summarize the key takeaways of this PDF for me?

#### ChatGPT

The PDF titled "Generative AI & The Management Consulting Industry" by Qatalyst provides insights into the use of generative AI in consulting. It emphasizes the disruptive impact of AI in this sector, highlighting its capabilities in research, data analysis, and automating repetitive tasks. The document underscores the need for firms to adopt AI strategically, integrating human and AI strengths. It also discusses challenges in AI adoption, such as awareness, complexity, trust issues, training needs, regulatory uncertainties, costs, and resistance to change. The report advocates for customizing AI applications to specific business processes, stressing the importance of validation and selective internal app development.

#### **Literature Reviews**

- Topic exploration/mini-searches
- Ask questions of GPT-4, BingChat, or Copilot
- Summarizing pdfs
- types of files
- Preparing a summary or overview

007

• Ask specific questions of a pdf or set of pdfs or other



#### Image, Video and PowerPoint Generation

Using AI Tools such as Midjourney, Leonardo, Dall-e 3, or Canva's Text to Image App, you can write a simple prompt and generate stunning imagery in seconds

We published a blog series on AI, in which all visuals were generated using Midjourney's AI

Software including Invideo AI and OpenAI's recently announced SORA can move to a text prompt or outlined script to full video with voice over in seconds

With Microsoft Co-pilot, you can go from a report, Executive Summary or outline in Word directly to a PowerPoint presentation. You can go from ChatGPT directly to Canva.

#### You

My consulting firm is giving a presentation on the topic of Al. Specifically, we will talk about why we have prioritized integrating AI into our practice and the different ways we are using it to improve productivity. What are some ideas on what to title the presentation?

#### ChatGPT

Creating a compelling title for your presentation is key to engaging your audience right from the start. Here are some ideas that highlight the integration of AI into your practice and its impact on productivity:

- 1. "Al Transformed: Revolutionizing Productivity in Our Practice"
- 2. "The Future Now: Leveraging AI for Enhanced Productivity"
- "Intelligent Innovation: How AI is Reshaping Our Business Landscape"
- 4. "AI in Action: Transforming Workflows for Peak Efficiency"
- "Navigating the AI Revolution: Strategies for Smarter Productivity"
- 6. "Empowering Success: The Impact of AI on Our Business Processes"
- "Beyond Automation: AI as a Catalyst for Business Excellence"
- 8. "Harnessing Al: A Game-Changer in Business Productivity"
- 9. "AI-Powered Solutions: Redefining Productivity in Our Firm"
- 10. "The Al Advantage: Elevating Our Business Through Smart Technology"

Each title aims to encapsulate the essence of using AI as a transformative tool in your business practice, emphasizing innovation, enhancement of productivity, and future-focused strategies. 007

#### **Brainstorming or First Drafting**

- Give you ideas on a certain topic
- Suggest options, strategies, recommendations or actions that could be implemented
- Develop job descriptions
- Develop a marketing plan
- Structure a proposal

		99	P	0	×
					~
• need • C	hoose a syr	nonym	~	Ŵ	
😑 Engageme	ent · Choose a	a different word	0		
would be le	ess <del>powerf</del> t	<del>II potent</del> than	GPT-	-3.	
Accept	Dismiss	•••	<	>	
• we • Add	a comma				)
• own • Re	move redui	ndancy			
					$\lor$
	_				
Correctness	Clarity	Engagement		Delivery	/

#### Writing, Summarizing and Editing

- Outlining
- Drafting initial content (sections, profiles, Executive Summaries, etc.)
- Rewriting sections or paragraphs
- Identifying problematic grammatical and stylistic errors
- Editing or proofing
- Rewriting in a different voice or for a different audience



#### **Examples of Other Uses**

- Reviewing, writing and responding to emails
- posts
- Formula free analysis of Excel data
- Meeting transcripts
- Software development

• Prepare marketing materials, blogs and social media

### **OCCASSIONAL TASKS VS AUTOMATED PROCESSES**



Those occasional uses are amazing, but it is the potential for automating processes that has us really excited.

# **AUTOMATED PROCESSES**



#### What Does Automation Look Like?

#### We Build It:

- Deploy

#### We Test, Test and Further Test It

#### We Use It

- Import the data
- Produce the Output
- Validate it

• Examine a recurring process in our operation • Break it down into its constituent parts • Develop reusable scripts to process the data

• Parallel testing and continuing adjustments

# **AUTOMATED PROCESSES: SALES HAS THE #1 PRIORITY**

RFPs								
RFPSI	LIST CALEN	NDAR SOURCES						
+ AD	D RFP 👤	EXPORT T FILT	<b>C</b> Sear	ch				
NON-	REJECTED	NEW REJECTED	CLEAN PO	SSIBLE	INTERNAL	POSTED	(AI) ALL	
	Posted	Title	Client	Source	RFQ	Status	Bid	
	Feb 10, 2024	10-Year Housing and Homelessness Plan	The United Counties of Prescott- Russell	Bids & Tenders		Poste	dOpen	
	Feb 10, 2024	Program Review - School of Community Government	Government of the Northwest Territories	Biddingo		Poste	d In Discussion	
	Feb 10, 2024	Economic Development and Culture Strategy and Action Plan	Town of Orangeville	Bids & Tenders		Poste	d Open	
	Feb 09, 2024	Survey Services 2024-2027	Community Development, Community Services	Canada Buys		Poste	d In Discussion	
	Feb 09, 2024	Market Research Services	Alberta Gaming, Liquor and Cannabis Commission	Alberta Purchasin Connectio	g n	Poste	d Open	
	Feb 09, 2024	Consulting - Foreign Direct Investment Strategy Development	City of Brandon	Biddingo		Poste	d In Discussion	

### **Goal: Automation of Our Proposal Function**

#### Steps

- Harvesting
- Prioritization
- Posting (sharing)
- Bid Decision
- Proposal Outline
- Team Development
- Review and Submission

• Content Development & Compilation

# **AUTOMATED PROCESSES: SALES**

				2	😫 MEMBERS (2)	🏷 DETAILS	OUTCOME
P	0325	RESEA	RCH AI	ND EV	ALUATIC	N FRA	MEWORK:
TA	ASK LIST	CALENDAR	KANBAN	GANTT	PROPOSAL OUT	LINER	
1.	Upload	RFP					
0	Upload p	odf or docx					
	Advanced	Options					~
2.	Excerp	ots of Com	mon Sect	tions	VCEDDTS		
Man	idatory and	Rated Criteria	5	g reion i	EXCERPTS		
Ma	andatory ar	nd Rated Criteria					
Bac	kground						

#### **Some of the Progress Made to Date**

- web to our QataLink database
- our company
- weeks

• An automated script runs nightly to pull RFPs from the

• A fine-tuned AI predicts which RFPs are best-suited to

• OpenAI reads the RFP and posts the key details into QataLink for our team and associates to review

• We meet to confirm which proposals we are developing this week and tentatively in upcoming

# **AUTOMATED PROCESSES: SALES**

#### 3. Proposal Headings

Specific Instructions
leadings

#### 4. Proposal Outline



#### **Some of the Steps Where Work is Ongoing**

- members
- created and reusable text
- summited

• Open AI develops a detailed outline of the proposal

• We use AI in suggesting and recruiting potential team

• We compile the proposal using a mixture of fresh

• The proposal is reviewed, edited, finalized and

# **AUTOMATED PROCESSES: TESTING RESEARCH APPLICATIONS**

#### **Goal: Automation of Research Functions**



- Guide Development
- Survey Administration
- Transcript Summarization
- Thematic Analysis
- Survey Summarizer
- Preliminary Writeup



#### **Our Focus to Date (early-stage):**

# **AUTOMATED PROCESSES: RESEARCH**

NEW TRANSCRIPT       THEME ANALYSIS       PREVIOUS TRANSCRIPTS       GPT-3.5       GPT         Image: Constraint of the options will result in a faster runtime.       Image: Constraint of the options will result in a faster runtime.       Image: Constraint of the options will result in a faster runtime.         Image: Constraint of the options will result in a faster runtime.       Image: Constraint of the options will result in a faster runtime.         Image: Constraint of the options will result in a faster runtime.       Image: Constraint of the options will result in a faster runtime.
NEW TRANSCRIPT       THEME ANALYSIS       PREVIOUS TRANSCRIPTS         Image: Contract of the analysis       Upload a Word document (.docx) containing the transcript of a meeting. The AI will clean and/or summarize it for you. Unchecking one of the options will result in a faster runtime.         Image: Upload Docx       Tasks         Image: Upload Docx       Image: Clean       Summarize
<ul> <li>Upload a Word document (.docx) containing the transcript of a meeting. The AI will clean and/or summarize it for you. Unchecking one of the options will result in a faster runtime.</li> <li>Upload Docx</li> <li>Tasks</li> <li>Clean</li> <li>Summarize</li> </ul>
<ul> <li>Upload a Word document (.docx) containing the transcript of a meeting. The AI will clean and/or summarize it for you. Unchecking one of the options will result in a faster runtime.</li> <li>Upload Docx</li> <li>Tasks</li> <li>Clean Summarize Summarize Review Themas</li> </ul>
<ul> <li>Upload a Word document (.docx) containing the transcript of a meeting. The AI will clean and/or summarize it for you. Unchecking one of the options will result in a faster runtime.</li> <li>Upload Docx</li> <li>Tasks</li> <li>Clean</li> <li>Summarize</li> <li>Review Themes</li> </ul>
The AI will clean and/or summarize it for you.   Unchecking one of the options will result in a faster runtime.     Image: Tasks   Image: Upload Docx     Tasks   Image: Clean   Image: Summarize Tasks
Upload Docx          Tasks         ✓ Clean       ✓ Summarize         ✓ Themes
Upload Docx Tasks Clean Summarize Review Themes
Upload Docx Tasks
Clean V Summarize Review
mentes
Context
Themes (seperate with semi-colons)
ANALYZE

#### **Tool: Transcript Analyzer**

The challenge is to go from multiple speech-to text transcripts to varying forms of detail and summarization. For example, we can produce:

- Cleaned transcript
- Summary transcript at specified levels of detail
- Thematic analysis (1) in summary bullets (2) supported by verbatim quotes and (3) linked to specific respondents and comments
- Responses to specific questions in the guide
- Responses to specific initial or follow-up questions
- Text entered in Excel by respondent and question

# **AUTOMATED PROCESSES: RESEARCH**

#### 1. Upload Cleaned File(s) to Analyze

Upload Transcript(s)	
UPLOAD FILES	
2. Define Context	
3. Define Questions	
Question 1	×
Question 2	×
+ ADD QUESTION	
4. Select Options	
Reference page numbers Reference respondents Summarize each respondent	

#### **Tool: Survey Analyzer**

Survey summarizer going from a database of closed and open-ended responses to varying forms of detail and summarization. For example, we can produce:

- back into excel)
- Analysis by row and by column

• Thematic analysis in (1) summary bullets supported by details (2) supported by examples or verbatim comments and (3) linked to specific respondents (coded

• Responses to specific questions we have



# 4. What is Our Underlying Strategy for Al?



AREOR

#### What is Our Medium-term Strategy for AI?

- 1. Continue to incorporate AI into our existing processes
- 2. Restructure our processes to take advantage of AI
- 3. Redesign the firm and our services

# **RESTRUCTURING OUR PROCESSES**

### **Potential Example: Key Informant Interviews**

#### The Traditional Approach

- Formally structured questionnaire
- Administered and recorded by question
- Entered into a database
- Coded column by column
- Write Up

#### What Al Allows You to Do

- particular order

• Discussion touching on major themes in no

• Capture results in a detailed transcript

• AI thematically analyzes all the KI transcripts, which can automatically be done: • Question by question (columns) • Respondent by respondent (rows) • Overall (all rows and column simultaneously)

# 5. What Have We Learned?



# WHAT HAVE WE LEARNED?

AI is easy to use but hard to use effectively. It is always a work in progress.



- measures
- Software development is not a major barrier

- Implementing agents will be challenging
- We need to build validation into each step
- tailored to the specific use case and data
- The potential for bias is real
- Copilot)
- Be selective about what apps we develop internally
- Work mostly with our own data (data we know or can access to verify)

• AI is a prediction technology without clear confidence

• Prompt engineering involves a lot of trial and error • Fine tuning can significantly improve effectiveness We need deliberate guidelines/processes regarding privacy • Customized automation is key (limitations of GPTs and

• Cost increases with the power and use of the models

# 6. How Do We Validate?

000

O

6



# HOW DO WE VALIDATE?

AI is a black box. How can we trust what it is telling us?



- Break the tasks into a series of sub-tasks
- Validate at each step in the process (adjust if necessary)
- Have knowledgeable humans involved through the process
- Generate a range of different types of outputs that you can review and compare (e.g., themes, summaries, verbatim text)
- Know your data / control your data
- Also use AI to help validate the results
- Follow-up with specific questions

# 7. How Do We Maintain Data Privacy?



# **GENERAL APPROACH**

#### Welcome to the OpenAl developer platform

#### Start with the basics

**Ouickstart tutorial** Make your first Chat Completions API request Prompt examples Explore what OpenAl models can do with prompts

#### Build an assistant



Introduction Beta Learn the basics of building an assistant

Assistants deep dive Beta Explore how assistants work and important concepts

Primary (research) data tends to have the most significant privacy concerns. We are still largely in the development and testing stage with research tools. As we begin to roll out these tools, we will need to:

- own systems

• 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 • Use business APIs for primary or private data • Strip out personal information before using AI Understand how and where the server stores the information (including any fine tuning data) • Actively manage files on those servers • Control access to and otherwise protect the data on our

# **AI AND DATA PRIVACY**

#### Does OpenAI use my content to improve model performance?

We may use content submitted to ChatGPT, DALL-E, and our other services for individuals to improve model performance. For example, depending on a user's settings, we may use the user's prompts, the model's responses, and other content such as images and files to improve model performance.

Please refer to this article to understand how content may be used to improve model performance and the choices that users have.

Please note that we do not use content submitted by customers to our business offerings such as our API and ChatGPT Enterprise to improve model performance. Please see our Enterprise Privacy page for information on how we use business data.

#### **OpenAI**

• Anything entered in ChatGPT's front-end may be used for further training of the GPT model.

• The privacy of business data submitted through the API is protected and not be used for training.

• However, this data is still stored in USA.

# **AI AND DATA PRIVACY**

#### Data stored about user interactions with Microsoft Copilot for Microsoft 365

When a user interacts with Microsoft Copilot for Microsoft 365 apps (such as Word, PowerPoint, Excel, OneNote, Loop, or Whiteboard), we store data about these interactions. The stored data includes the user's prompt, how Copilot responded, and information used to ground Copilot's response. For example, this stored data provides users with Copilot interaction history in Microsoft Copilot with Graph-grounded chat ☑ and meetings in Microsoft Teams ☑. This data is processed and stored in alignment with contractual commitments with your organization's other content in Microsoft 365. The data is encrypted while it's stored and isn't used to train foundation LLMs, including those used by Microsoft Copilot for Microsoft 365.

#### **Microsoft 365**

- organizer
- used for further training

• Transcripts generated from Teams meetings are stored on Microsoft's servers until deleted by the meeting

 These servers are located in Canada (for Qatalyst) • They are stored in the same place as Outlook emails

• Data shared with Microsoft Copilot is encrypted and not • This data is also stored in Canada (for Qatalyst)

• Messages that were sent to Copilot can be deleted but deletions can take 1-7 days to remove the data from Microsoft's servers

# 8. Final Thoughts



## **PARTNERING OPPORTUNITIES**

#### **Project Work**

We are always adding to and strengthening relationships with our pool of associates:

- Preparing proposals
- Leading projects
- Serving on our project teams
- Marketing our services

#### **AI Applications**

- Joint development and testing of applications
- Cost-sharing development of AI applications
- Tailoring applications to your processes
- Encouraging clients to incorporate AI processes into their projects

We are interested in working with associates and clients in developing in adopting and adapting AI: