

# 2023 Industry Insiders' Guide

## Volume 4



**MR Worldwide:  
Best Practices for Optimized Global Data Collection**

*Curated by The Logit Group*



# When it Comes to AI: Think Workflow not Chat!

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The use of AI in Insights has become a hot topic. It seems like there isn't a day that goes by without some new claim from a supplier, or a question from a client, or a conference theme that touts the revolution of AI.

And it's fair to say this buzz is largely justified. Generative AI technologies are truly ground-breaking and their influence in our industry is expected to be profound – for good or for bad.

It's also fair to say that the Insights Industry has been a little behind in their adoption. They have been around for several years, and those of us with one foot in the tech industry have been using them since the first viable models appeared around 2019 (with models like GPT-2 and BERT). However, much of the Insights Industry was unaware of them until they caught the attention of mainstream media with the release of ChatGPT in the winter of 2022.

The hype storm that surrounded ChatGPT was a good thing in that it woke people up to the deep possibilities of these technologies. Unfortunately for many, the term "ChatGPT" also became synonymous with the field.

I say unfortunate, because while ChatGPT was exciting and caught the imagination of the world, the reality is, chat is probably not the answer for your company's growing needs.

Let me give a small metaphor. Imagine you just hired a new intern, and you quickly realize that she is brilliant. She seems to have an amazing breadth of knowledge and while she is quite inexperienced – and sometimes gives naïve answers – she is amazing at what she does and seems to have endless energy and an incredible work ethic.

So, would you just put her in a room and chat with her? Or would you get her to work, giving her specific instructions, tasks and responsibilities?

Many people have become enchanted with the chat interface offered by ChatGPT and other similar systems and believe that is the only way to use these technologies. And while it is sometimes useful to be able to have a simple conversation and use them for brainstorming it is only scratching the surface of their value. Also, using the public interfaces of these systems can be a significant privacy and confidentiality issue.

So, if these technologies are so powerful, but using chat isn't the way to use them, what should we be doing? This is where workflow comes in. Underneath all these systems are powerful models that can be used in many ways. And around these models is an entire ecosystem of technologies that allow them to be embedded into your day-to-day workflows.

Let's put this into a real life application - you have twenty hours of In-Depth Interviews (IDIs) transcriptions that you wish to summarize. Summarization and draft report writing are a great use of the technology. For this use case however, you would not be able to do this in the public ChatGPT, as

(a) it would be a confidentiality violation to paste it in and (b) the sheer amount of text would cause the system to fail – chat interfaces have a hard limit on text size that really isn't that big.



So, how do we do this? By thinking workflow – not chat. A typical workflow might be:

1. Break each IDI into smaller chunks
2. Summarize each chunk
3. Collate the summaries for each interview and summarize
4. Produce a report based on the aggregation various summary levels, including an Executive summary.

A very simple workflow, and exactly what we implemented in our early version. It turns out that the way to achieve real work is to break tasks down into workflows and implement those.

There is a large and exciting programming ecosystem growing up around these technologies. If your company does have development capability, then these are the tools that will need to be used. If not, then you will need to be partnering with agencies and suppliers that do.

This is a pivotal moment in the Insights Industry, and that using these new technologies will be central to staying competitive. But to do so requires that we move beyond the early excitement about chat and move towards implementing truly useful systems. And thinking workflow is a great place to start.



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With an infectious passion for analytics and data science, Chris is at the forefront of driving our global growth by expanding our methods, tools, and techniques to deliver exceptional value to our clients. Recognized as an industry expert in research methodology and data science, Chris has established a strong presence in the Insights Industry. With a steadfast belief in the importance of robust methodology and a keen focus on solving real business challenges, Chris combines expertise with a touch of lightheartedness.