

# OPTIMIZATION THROUGH DIGITAL ENGAGEMENT

# GOVERNMENT OF CANADA

## WHO

Office of Small and Medium Enterprises, Pacific Region used Ethelo to optimize event planning

## GOAL

Identify and detail event planning efficiencies and increase outreach quality

## HOW

The Ethelo platform and team combined business community stakeholder outreach with management knowledge

## OUTCOME

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Optimized event plan pointing to high operational ROI (85%+) and many additional benefits

One of OSME's core activities is promoting services to help small and medium-sized enterprises do business with the Government of Canada. As part of their outreach to the business community, OSME Pacific attended over 30 different events in 2015, leading to contact with over 4,200 people in the BC and Yukon business community. The OSME team needed to develop a high-impact program for community outreach that met the needs of a broad range of businesses representing different sectors, regions and priorities.

## BACKGROUND & APPROACH

# THE PROBLEM-SOLVING COLLABORATION COMBINED OSME MANAGEMENT KNOWLEDGE WITH BUSINESS STAKEHOLDER REQUIREMENTS

The OSME team needed to develop a high-impact program for community outreach that met the needs of a broad range of businesses representing different sectors, regions and priorities. This was a significant logistical challenge because there are more than 80 potential events, of different focus, timing, impact and cost. Tradeoffs had to be made, balancing budgetary constraints, HR resources, logistics and new, complementary ways of delivering value to the business community.

Ethelo was asked to help optimize future event selection by combining the needs of business stakeholders with management insight and historical event data. The Ethelo team worked with OSME management from May to August 2016 to define a framework for success, launch the digital collaboration and deliver an optimized plan of events to attend.

## HOW ETHELO HELPED DEVELOP OSME'S HYPOTHESIS

### **ALIGNING DATA AND COLLECTIVE KNOWLEDGE ASSETS**

OSME hypothesized that optimizing their outreach effort lead to meeting existing outreach objectives, increase outreach quality and reduce overall costs. They had many information assets, a network of over 150 trusted partners and a good general sense of what could be achieved.

Historical event information was incomplete, spread across many sources, and lacked some objective measures. The optimization problem space was massive with 80 different events to consider ( $2^{80}$  event combinations).

Ethelo collaborated with OSME to define effective evaluation criteria for viable scenario generation. Aside from demographics, cost, date, attendance and event quality was captured. The underlying complexity had to be embraced, not avoided.

## PROCESS

# STRUCTURED CONSULTATION

### Capturing knowledge and sentiment for optimal outcomes

It was vital to integrate the collaborative input of stakeholders. OSME worked with Ethelo to identify appropriate communication to encourage the participation of 150 trusted partners. The aim was to find a schedule that combined the most valuable events, contributing strategically to objectives in 2016-17 business plans. The platform asked each participant to evaluate events they knew of by considering the proposal:

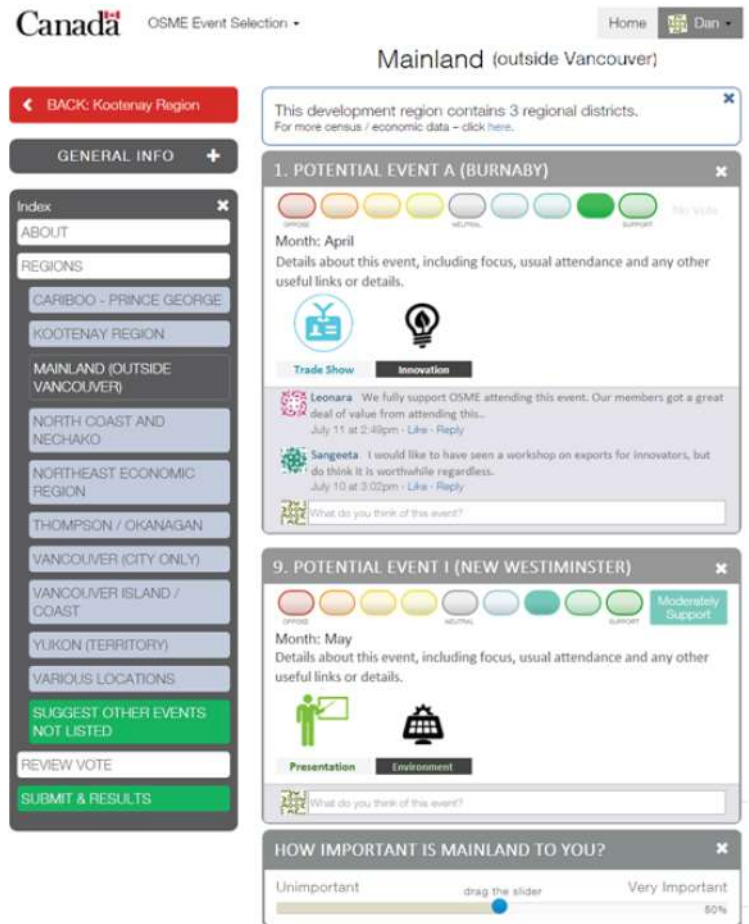
### “Would you see benefit in partnering with OSME at this type of event?”

and record their ratings on Ethelo’s 9-point rating scale. Participants also recorded their corresponding comments, replies and “likes” for the different events, which proved to be valuable qualitative input for future planning specifics.

The screen on the right shows the presentation of the digital outreach. Participants were able to navigate between event ratings in each region, record their regional weighting preferences and view the interim results.

### Objective Problem Solving

OSME provided Ethelo with a fully populated list of 80 events, along constraint information that would help identify scenarios that would be actionable from a business perspective



These constraints included:

- Maximum cost for the whole event schedule
- Minimum average per-attendee cost limit
- Requirement that all 10 regions were served
- Requirement that all 8 domains of interest, such as Innovation and Aboriginal Businesses, would be covered
- Minimum event quality threshold
- Preventing unworkable demands on OSME staff during busy months

The combination of these constraints maximized quality and coverage, while minimizing costs and resourcing problems. This had the dual purpose of maximizing taxpayer value and demonstrating a path for OSME to resource new future-focused activities.

Once the event data, descriptions and constraints were loaded into the platform, Ethelo calculated all potential event schedules, based on all combinations of events that met the management-defined constraints.

## **MANAGING COMPLEXITY**

Solving a complex problem is possible by smart problem reduction, computer processing capacity and the distribution of processing. This complex data management must operate in the background and be invisible to the participant experience.

Ethelo reduced complexity of the problem by setting in/out thresholds of popularity. This still left many events as “maybes”. The Ethelo platform then processed the remaining 12 billion scenarios over several problem solving units at a rate of hundreds of thousands of combinations every second. Ethelo used this analysis to create a shortlist of the very best 100,000 solutions.

That set the scene for the final stage of creating the collaborative event schedule.

## **PERFECTING THE SCHEDULE**

Ethelo provided OSME with a filtered spreadsheet of the top 100,000 scenarios, along with a short tutorial on finding the best schedule. Management were able to use their own filters to generate shortlists, and experiment with different settings and trade-offs. Although many of the 100,000 plans would have been very good, this final filtering step provided the means to identify the very highest quality and delivered value in many different ways.

## RESULTS

# OBJECTIVITY AND COLLECTIVE WISDOM CREATED PATHS TO SAVINGS

### 1

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#### MEANINGFUL ENGAGEMENT

38% of the 150 partners invited provided ratings and comments, ensuring a broad and robust basis of analysis. The engagement process also visibly reinforced OSME's continuous dialogue with the business community.

### 2

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#### HYPOTHESIS CONFIRMED AND DEMONSTRATED

Ethelo provided tangible proof of OSME's hypothesis that optimizing their event plan schedule by reallocating labour and financial resources to a new suite of activities would provide great value relative to the organizational goals.

### 3

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#### INCIDENTAL, NEW DISCOVERY BENEFITS

The process of discovery was a catalyst for uncovering new knowledge from partner organizations and for creating a coherent structure around many disparate data sources. This data renewal will be highly useful beyond event scheduling.

### 4

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#### HIGH ECONOMIC VALUE IDENTIFIED

Ethelo's decision-tool provided a ranked and optimized set of event schedules to meet OSME's goals. The results described the potential for reducing the number of events attended by at least 15 and up to 30.

This translated into lower event, travel and labour costs that pointed to an ROI of at least 85%. Aside from substantial capital savings, between 140 and 280 staff hours could be deployed for new value-adding activities. Arriving at this optimal mix without Ethelo would have been very difficult, time consuming and less thorough.