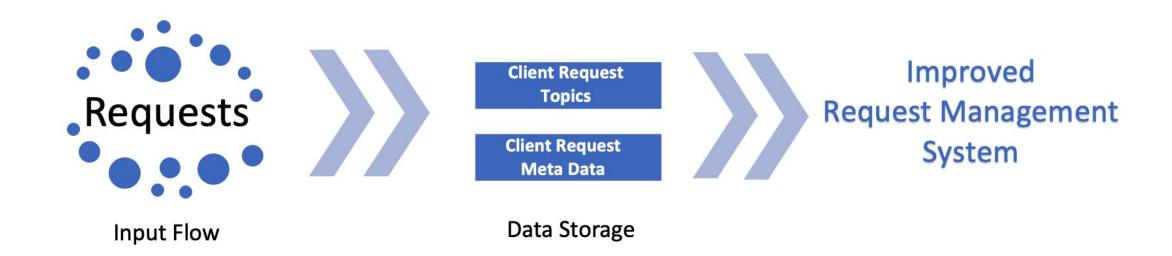


# **GLG** Generalists

Team members:

Tatiana Chebonenko, Milan McGraw, Divyanshu Murli

## Why, What and How about the project



### The Problem?

### **Industry Topic:**

"Appliance Retail Space"

From: CPrudhomme@glgroup.com <CPrudhomme@glgroup.com> on behalf of Caitlin Prudhomme <CPrudhomme@glgroup.com>

Sent: Tuesday, July 18, 2017 9:31 AM

To: Milan McGraw <mcgraw@uchicago.edu>

Subject: GLG Project Opportunity: Appliance Retail I Overview

Hi Milan,

I hope you're doing well. I'm writing to introduce the below opportunity on the appliance retail space. My client is hoping to discuss the challenges that online retail presents to the space. Given your background, I thought you might be able to add value here.

Please let me know by accepting the opportunity at the following link:

https://services.glgresearch.com/cm/accept/accept?

cpid=24649801&jwt=ey:hipGciOiJIUzI1NilsInR5cCl6lkpXVCJ9.eyJyb2xILWdsZyI6NCwiYWYiOjQsImlkcyI6W3sicGVyc29ua WQiOjE0ODE25DUsImNtaWQiOjEwMjEzMDV9XSwiY21pZCl6MTAyMTMwNSwiY21pZC1wZXJzb25pZCl6MTQ4MTQ4NS wiapyHjpiVzNzaWNHVnljMjl1YVdRaU9qRTBPREUwT0RVc0ltTnRhV1FpT2pFd01qRXpNRFY5WFE9PSIsImlhdCl6MTUw MDM4ODI2OSwiZXhwljoxNTAwNTYxMDY5fQ.Eu09z i7DdlHGEuJaY-WeTEILf8hdaKeMpMRUQxH4C4

For more detail, here is the full project description:

One of our clients, an analyst at an investment management firm, would like to speak with a Council Member who is familiar with the appliance retail space. More specifically, the analyst would like to discuss the challenges that online retail faces in the space.

Reminder: Council Members are not expected or permitted to discuss their current company and/or provide any confidential/proprietary information about their former employer(s) and third parties.

Thanks.

Caitlin Prudhomme

CPrudhomme@glgroup.com I 737-208-2458

Terms and Conditions: If you have not already done so, you will be required to complete an online tutorial about confidentiality and sign the current Terms and Conditions of Council Membership ("Terms and Conditions"), before you can accept this project. We may also ask you a few questions to help determine your suitability for this project. Acceptance is complete once you acknowledge that your GLG profile is current and that your participation in the project is bound by the Terms and Conditions, which provide, among other things if you are employed, you may not speak on behalf of or about your employer. To encourage you to err on the side of caution during your participation as a Council Member, you may submit a payment request for the full time you set aside for any project you discontinue in order to comply with your obligations and the Terms and Conditions.

# How big?

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ММ	Milan Mcgraw  > GLG Project Opportunit (2) 4/9/2018 Ceclie, so sorry, I am out on vac Inbox	Shelly Reynolds GLG Project Opportunity: *F 11/14/2016 Hi Milan, I hope you're doing w Inbox	Jacqueline Schindler GLG Project Closed: iRobot 1/26/2017 Milan, I wanted to let you know Inbox	TK	Terrance Kennedy I have a GLG project opportu 11/8/2017 Hi Milan, I wanted to follow up Inbox
ММ	Milan Mcgraw  > GLG Project Opportun (2) 3/28/2018 I can speak to this but out on va Inbox	Melissa Polinsky Follow up on GLG project o 11/10/2016 Hi Milan, I wanted to follow up Inbox	Robert Wijk  GLG Project Closed: Electric 1/17/2017  Milan, I wanted to let you know Inbox	TK	Terrance Kennedy  GLG Project Opportunity: A 11/8/2017  Hi Milan, I hope you're doing w Inbox
El	Emily Irwin Profile Questions E-Com 3/13/2018 Hi Milan, Please take a moment Inbox	Melissa Polinsky I have a GLG project opport 11/9/2016 Hi Milan, I wanted to follow up Inbox	Lauren Bledsoe > I have a GLG project oppo 1/12/2017 Hi Milan, I wanted to follow up Inbox	ММ	Mitchell Morton  > GLG Project Opportunity: 10/10/2017 Thanks Milan, Would you be in Inbox
JF	Jacob Flax GLG Project Opportunity: Req 3/6/2018 Hi Milan, I hope you're doing w Inbox	Melissa Polinsky *URGENT* GLG Project Opp 11/9/2016 Hi Milan, I hope you're doing w Inbox	Lauren Bledsoe  GLG Project Opportunity: S 1/12/2017  Dear Milan, I hope you're doing Inbox		Milan McGraw  > GLG Project Opportunity: 10/10/2017  Mitchell, I answer the same Sent Items
EI	Emily Irwin GLG Project Opportunity: E-C 3/6/2018 Hi Milan, I hope you're doing w Inbox	mhart@glgroup.com Request for Referral Foam 11/4/2016 Hi Milan, I hope this note finds Inbox	Robert Wijk  Follow up on GLG project op 1/10/2017  Hi Milan, I wanted to follow up Inbox	LC	Lauren Cameron Follow up on GLG project op 10/5/2017 Hi Milan, I wanted to follow up Inbox
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AS	Angela Shang *Follow-up* GLG Project Op 2/15/2018 Hi Milan, I wanted to follow up Inbox	Jonathan Ennis  GLG Project Opportunity: Kit 10/6/2016  Hi Milan, I hope you're doing w Inbox	Jacqueline Schindler  GLG Project Opportunity: iRo 12/7/2016  Hi Milan, I hope you're doing w Inbox	MF	Morgan Franklin  GLG Project Opportunity: Ov 9/26/2017  Hi Milan, I hope you're doing w Inbox
MR	Mary Winston Richardson  > GLG Project Opportun (3) 2/14/2018  No problem, I have removed yo Inbox	Morgan Romey Follow up on GLG project op 9/27/2016 Hi Milan, I wanted to follow up Inbox	Lauren Bledsoe  GLG Project Opportunity: H 11/25/2016  Hi Milan, I hope you're doing w Inbox	ZI	Zubin Iyer  GLG Project Opportunity: Cat 9/20/2017  Hi Milan, I hope you're doing w Inbox
ВВ	Britney Billstein GLG Project Opportunity: Sup 2/7/2018 Hi Milan, I hope you're doing w Inbox	Morgan Romey I have a GLG project opportu 9/26/2016 Hi Milan, I wanted to follow up Inbox	Shelly Reynolds  GLG Project Opportunity: *F 11/14/2016  Hi Milan, I hope you're doing w Inbox	EJ	Erica Jackey  GLG Project Opportunity: Rob 9/6/2017  Hi Milan, I hope you're doing w Inbox
MN	Molly Novatt Houseware Products   Lifetim 2/1/2018 Hi Milan, I wanted to follow up Inbox	Morgan Romey GLG Project Opportunity: E-C 9/26/2016 Hi Milan, I hope you're doing w Inbox	Melissa Polinsky Follow up on GLG project o 11/10/2016 Hi Milan, I wanted to follow up Inbox	JD	Justin Duck Follow up on GLG project op 9/1/2017 Hi Milan, I wanted to follow up Inbox

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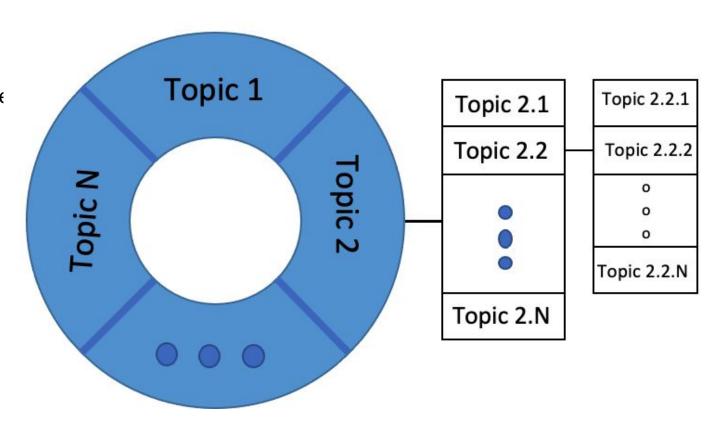
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# System Design-Topic hierarchical clustering

- Client requests sent through pretrained LDA model
- Leading topics with probability >= 20% after first leve
   LDA defines TOP hierarchical cluster the Client
   Request falls in
- The 2nd level has separate LDA model for each cluster in the TOP level
- The 3rd level has a separate LDA model for each cluster in the 2nd level
- Requests that have leading Topic probability < 20% form Miscellaneous cluster on any level



## System Design-MetaData

- Named Entity Recognition is used to extract Request's metadata
- Meta Data: Request key elements for further data analysis
- Primarily, target in this version is health care



Source: https://monkeylearn.com/blog/named-entity-recognition/x

### Ethical considerations

### None to consider:

- Given we are using public news and healthcare data sources, the intended outcome is a summary or LDA modeling of the proposed text. Future use case, could potentially involve use of more PII or Medical data use cases.
- Need to be aware of cultural biases that arise by country.
- We did not modify our strategy based on these assumptions.
- Currently we do not anticipate any issues that can potentially arise.

### Timeline

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#### **Topic Modeling:**

- 1) Fully developed 3-layer Hierarchical Clustering (model is based on LDA topic)
- 2) Clustering evaluation metrics

#### Meta Data Extraction (NER):

- 1) basic NER baseline pipeline
- 2) Defining Meta Data types

Topic Modeling:

Research and Testing ideas: Summarization, keywords Extraction etc.:

- 1) Try pretrained transformer
- 2) Evaluate model performance
- 3) Repeat

#### Meta Data Extraction (NER):

1) Finetune BERT on health care data

**Topic Modeling:** 

and

Model Deployment

*Meta Data Extraction (NER):* 

- 1) Finalize results
- 2) Select best approach
- 3) Prepare programs and code for deployment
- 4) Test system work and deliverables

**Machine Learning System Design** 

Plan **Prototype**  **Deploy to AWS** 

Week 9 - 10

Week 11 - 12

Week 12 - 14