Episode 18: "Curiosity, Empathy, and Data in the BI Journey"

with Kaylyn Kretschmer, Market Leader at Technical Safety BC

Over the last few years, Kaylyn Kretschmer has been a strong champion for BI at Technical Safety BC. Together we chat about how even technical systems rely on human decisions and human behaviours, an insight Technical Safety BC used to begin their BI journey. Kaylyn also shares her tips for socializing BI with folks from different backgrounds and the value of the local BI community for individuals and organizations new to BI.

Transcript:

KIRSTIN APPELT, HOST: Welcome to this edition of Calling DIBS. I'm your host, Kirstin Appelt, Research Director with UBC Decision Insights for Business and Society, or DIBS for short. Today, we're 'calling DIBS' on Kaylyn Kretschmer, a Market Leader at Technical Safety BC. I'm really excited that we have Kaylyn with us today.

I met Kaylyn a couple of years ago when Technical Safety BC was first starting to add behavioural insights to their toolkit and we've gotten to collaborate here and there over the last few years. And it's just been really neat to watch Kaylyn grow behavioural insights at Technical Safety BC, along with her team and colleagues. And on a personal note, Kaylyn's just always a treat to talk to, so I think we'll have a really fun conversation today. So welcome to the podcast, Kaylyn.

KAYLYN KRETSCHMER, GUEST: Thanks, Kirstin. And happy to be here.

APPELT: So, let's start off, my traditional question is just, “Tell us a little bit about yourself and your background.”

KRETSCHMER: Sure. My name's Kaylyn. I am a Market Leader at Technical Safety BC, and I'm actually leading now our Market Insights and Engagement team. I am originally from Toronto, so I moved over to BC to work with Technical Safety BC about four years ago, and have been loving living in the mountains and living by the ocean ever since. So, very keen to continue my life in British Columbia and continuing to be part of the pacific northwest behavioural insights community.

APPELT: And we're thrilled you're here. So where did your interest in behavioural insights begin?

KRETSCHMER: Well, my background is originally in psychology, so my Master's degree is in psychology and behavioural science. And so, I think from a young age, I was always really interested in understanding more about human behaviour and being able to really measure changes to behaviour over time.

And I specifically focused, in my early parts of my career, on health promotional behaviours. And so, I think my interest in behavioural insights really began when I was back in Toronto. I was working for the Li Ka Shin Knowledge Institute out of St. Mike's Hospital, and we were working with the Canadian Task Force on Preventive Health Care and really working to understand how physicians were working with patients to

explain different preventative health screening techniques and basically the risks and benefits of getting, for example, a breast cancer screening or a prostate cancer exam at different ages.

And so that was kind of an interesting experience because it's not in a policy environment where you're requiring people-- you're providing them with information, and hoping that they'll use it in their informed decision making. I could see a lot of opportunities where we could nudge people and really provide them with information at the right point of time, in the right way, that made decision-making easier and didn't require them to consciously, you know, understand and try to interpret really complex health information. So, I think that was kind of where it started, where I was like, “Hey, there's this opportunity to apply my interest in psychology” and, you know, human behaviour and also influence change in a meaningful way that produced positive health outcomes and patient outcomes.

And I think I have brought that passion with me as I moved into different job environments and most recently with Technical Safety BC, learning to work within a policy environment where you're now looking at enforcing regulation or code and you're kind of looking at compliance-based behaviours and seeing so many opportunities where we can use behavioural insights to address really simple process and communication challenges that lead to compliance issues.

APPELT: I have to say, I think that's always my favourite question to ask, because everyone's story is so different, but they all have some of the same themes across them about how we're all just so interested in behaviour and that there's all these missed opportunities out there where we can help people. I really appreciate the different nuances you brought up there about the different ways you've approached this. So, thanks for that.

And on that note, I think many of our listeners might not be familiar with Technical Safety BC, and can you tell us a little bit about it and in particular where it sits in the public versus private sector's borderlands?

KRETSCHMER: For sure. Yeah. So Technical Safety BC is a nonprofit organization. We're in the, as you mentioned, the cross between the public and private sector because we do serve industry, and particularly industries like construction, and some of the different natural resource areas, and we provide regulatory oversight. We're kind of an arm's length organization from government. We don't actually sit within government anymore. We used to. We really work in that space between, you know, providing regulatory oversight, but then also providing support for the industries themselves in being able to create and maintain safety systems and programs.

A little bit more about Technical Safety BC and our mandate, so we specifically look at overseeing, the installation, maintenance and operation of technical systems and equipment. In a lay language sense, that's really looking at things like, for example, the elevators or escalators in a mall or your condo building, making sure that they're installed by the right people that have the right knowledge, expertise and skills, and that they're effectively maintained and operated over time. We also handle things like electrical systems and equipment, things like gas systems, which could be anywhere from the gas fireplace in your condo, or in your home, to large commercial or industrial gas appliance installations.

And then we also handle fun things as well, like the ski lifts that you use if you go up to Cypress or anywhere else skiing in the province of BC. We have a kind of wide range of different technologies that we oversee. And our role is really to make sure that the right people are working on that equipment at different stages of its lifecycle and that were maintaining oversight and gaining insight and knowledge into how to prevent incidents or hazards from occurring.

APPELT: I think that is a really good explanation. And one of the things that I really love about Technical Safety and how you all entered the space is I think a lot of people hear technical safety, technical systems, engineering, appliances, and they don't immediately think human decisions and behaviour. When we hear the regulation of technical systems, we more often think about the machine side rather than decisions of the folks who build and maintain the machines or who have machines that should be maintained. So how did Technical Safety BC really connect those dots and decide to start exploring how to use behavioural insights?

KRETSCHMER: That is an excellent question. I think for a long while, especially as we moved out of government, the focus had been very much on the machines themselves and whether things were meeting code and regulation. And then I think in the last couple of years, we started to really get curious and ask the question “Why?”.

I think one of the ways that we started really connecting the dots between human decision-making and human behaviour and what we were seeing in terms of safety outcomes was actually evaluating the effectiveness of some of our policies and programs in influencing whether they're compliance kind of behaviours or some of the longer-term safety outcomes that we were trying to achieve and really trying to dig into why things may have been effective or may not be effective. And so that really gave us insight into some of the root causes of why incidents or hazards are occurring or non-compliances occur.

And that's kind of what has opened up the whole world and opportunity of behavioural insights to our organization is really seeing that in many cases people aren't intentionally trying to be non-compliant, but there may be barriers to them accessing information or the process may be really challenging. Or we may have built a policy or program that doesn't necessarily reflect the realities of what's happening on the ground within the industry itself. And so that's really allowed us to think about, when we're trying to understand the problem, the needs assessment side of the industry and the clients and folks that we serve, and really ensuring that we're integrating that into how we're designing things upfront.

I think it's really started by having that curiosity. And then from there, being able to ask some of those, you know, kind of effectiveness questions and then applying empathy and really looking at the data that we are seeing to realize that there is a human side and there's different factors that we need to be considering in our designs.

APPELT: I think that's great and I think it's really neat that Technical Safety BC really did connect those dots because I think, as we know, behavioural insights, it really impacts most, most jobs, organizations have some connection to human decision-making, but it's not always apparent. I think it's great that Technical Safety BC was able to make that connection.

I also think another reason I was excited to bring you on today is that I think Technical Safety BC is a great example of an organization that's a few years into its BI journey. It's, you know, still maybe you could say the later part of the early stage, or you're into it a few years, but you haven't been doing it for decades. I was wondering if you could tell us a little bit about the journey so far, some of the successes and challenges as you've started making progress on your BI journey?

KRETSCHMER: Definitely. Yeah, I would agree with your assessment that we are at the later stage of the early stage. We're starting out, but we've definitely made some progress. And I think some of the early challenges or some of the things that we faced early on in the journey where we had that growing awareness that, “Hey, this is something that we need to look at”, and this is something that we need to be considering in our programming and policy development.

But like, where do we actually start? It was really looking internally at some honestly, just like simple infrastructure and cultural things. So who do we have in the organization that had skillsets that would be able to support the application of behavioural insights principles, and really being able to do the analytical side, which is a key component, being able to do the measurement, and then how do we embed these types of questions and the curiosity within our culture so that people are constantly thinking about it and asking those questions and it's not just one small team within the organization trying to promote it, but then it's really across the organization and cross-departmental.

I think the first step was really to create that socialization and really familiarize folks with the concepts and the value of behavioural insights and what it can do for our organization, and then to give people really concrete examples and even results of successful projects, even if it wasn't necessarily in our environment. I think that really helped us with that initial visioning and culture. And then from there, it was really about identifying really good candidates for projects that we could start applying it ourselves.

For us, it was really helpful to pick things that were already moving and off the ground, rather than trying to start projects from the ground up. We were able to successfully integrate those principles and some measurement into a few projects that were already moving, and that further built capacity and kind of being able to see the vision of what could be achieved, because now it was tangible and now it was relevant to the organization. And some people actually were able to see the process unfold and built skills and experience as a result. It was kind of like starting small, but bringing people along.

APPELT: I love that. And one of the things that I think has been really interesting for me, watching all of this happen, is that Technical Safety BC, you have a really strong team of amazing folks, but most of those folks aren't coming from a BI background. And, like you kind of already alluded to, there is that socialization process. When folks are coming from these different backgrounds, how is your team, what tips and successes have you had in figuring out ways to communicate, for people coming from different educational and experience backgrounds, how to communicate about behavioural insights?

KRETSCHMER: Definitely. I think it's giving case examples that are relevant. Being able to speak the same language as others in the organization, so using things like, actually, if I can give a shoutout to Tobin from the City of Vancouver, I know he did a project on dog licensing and of using behavioural insights in that way. And that was a great example that we were able to show folks in the organization that was tangible, that had similar terms to what we use everyday, where it was about licensing, about compliance. And so that really helps communicate the overall principles of behavioural science. And then we were able to expand it out to say, “Hey, you know, it could be bigger than that”. And then we were able to kind of bring people along.

I think one of the things for our organization, since most people are very technically minded, was focusing on the data side, on the results and duration that really helped make things concrete for people and really tell the story of, you know, the value of testing and being able to apply different approaches and see how it affects outcomes and people's decision-making and behaviour. And so that was kind of the common language that I would say was really easy to share with people, and really helped us along that journey.

APPELT: I love that, and you're really just talking about how you used behavioural insights to communicate about behavioural insights. So, making it easy, using those case studies, and I love the dog licensing one as well. And then that idea of, you know what do we already have in common, which would be data in your case, and then building from there. I think that's really strategic and smart.

KRETSCHMER: Definitely. I think one other piece, if I could share, that was critical as well in the kind of socialization and communication process, was making sure that we were embedding this into our

organizational strategy and business plans. So we worked really hard at the senior leadership levels to really get that buy-in and support upfront, and embedding it in to core documents like our ten-year strategy and our annual and three year business plans, was really helpful in being able to refer people back to our goals and how this related to their work, and that also helped build buy-in and consistency across the organization when we were talking about the application of these methods and techniques.

APPELT: I think that is very strategic. I've seen organizations approach it both ways, and I think I've seen it more often be successful when you've done what you've done with the building it in and having it be, what's the word I'm looking for, visibly included in the high-level documentation. I think that is, again, a very strategic way to go forward.

KRETSCHMER: And also having you and Heather, if I can give another shoutout, I think also having others that aren't internal within the organization but are in this space and have either, you know, a similar background to your organization, in Heather's case, it's, you know, working in government and having so many government partners in ministries that we work with as well.

But having others be able to speak to the value and the principles as well, and kind of echo what the internal team was saying, also helped to reinforce, “Hey, this is something that we need to be paying attention to, and listening to, and other people, other peers are doing the same thing”. It kind of also embedded us in a larger network, which I think got people excited as well.

APPELT: I think that's actually something I wanted to ask you a bit about. I want to come back to hearing more about how Technical Safety BC is using BI and some of your projects, but I think pulling on that thread, another thing that's great about Technical Safety BC, we're all about shoutouts today, is even though the organization was just starting out in BI, from the beginning of your journey, you've been a major part of our local BI community and taking an early leadership role, sponsoring BIG Difference BC, etcetera. So, and I think you alluded to this a bit, but could you talk a bit more about how being part of the local BI community has been valuable and what that's enabled you to do, ways that's been beneficial?

KRETSCHMER: Definitely. I think the first one is definitely being able to help our organization along on our change journey and being able to have folks like you and Heather come and speak to other projects that you've worked on and just kind of the science behind it. I think that was really critical.

Being part of the larger BI community I think has also helped our organization stay in touch with best practices and making sure that we're all sharing what's working, wins, things that maybe were learnings but not successes. I think it offers an opportunity for that knowledge mobilization and knowledge sharing, not just within an organization, but across organizations. And so, we can learn from each other and we can kind of, instead of always having to go to the literature, be able to leverage each other's work, and build off of it. I think that's been a real strength of the community, being able to come together, share our knowledge, and be able to stay in touch with the latest practices.

APPELT: Absolutely, and it's been really neat to see the plan from Technical Safety BC, I know it was going to be like being part of the sponsorship and then presenting and then just totally taking off all of those boxes. It's neat to see Technical Safety BC becoming a bigger and bigger part of the community. And on that note, as a person and an organization in those shoes, how have you seen the local community grow and change over the last few years?

KRETSCHMER: Yeah, even just thinking about the conferences that we've attended with BIG Difference BC, just seeing the number of people that are now part of the community is amazing, and the breadth of what is

happening across BC, and I guess we're looking kind of larger at the Pacific Northwest, I think there's been a growth in organizations really tuning into the value and power of behavioural insights and evaluation. And I've been able to see so many interesting projects in different sectors that I think as we started out on our journey, we hadn't had access to. It's been cool seeing the variety of organizations from government to, you know, academic organizations, non-profits and even the private sector, really owning behavioural insights in their own way, and being able to contribute and share within the community.

APPELT: Absolutely, I think one of the things that's been neat for us on kind of the organizing side is that we've kind of set goals for us each year in which sectors we will really want to try to push. And so far, it's just the demand to be connected is exceeding even our pacing. We say, like, “Okay, let's try to do a little bit more in this sector this year”. And then we just, you know, really get higher numbers and just there's a lot of demand. It's been really nice to see. I guess going back to BI at Technical Safety BC a little more closely, now that you do have a few BI projects under your belt over there, can you tell us about one or two favourite projects?

KRETSCHMER: Sure. One of the projects that I would like to share is actually a really simple one. This is like a true nudging project. And if anyone is in the product space, it's a clear example of product continuous improvement. So, I think this was maybe three years ago, our compliance and enforcement team came to us and said, “Hey, we are seeing a huge volume of duty holders that are incorrectly valuing their permits”. And this specifically related to boiler devices that they were installing.

APPELT: Can I just jump in and ask you to clarify the term duty holder?

KRETSCHMER: Oh, yes. We use it interchangeably. Sometimes we refer to folks as our clients, and sometimes duty holders. Essentially, it's anyone who is responsible for the installation, operation or maintenance of equipment under the Safety Standards Act. So, sometimes we refer to them as duty holders, they could be contractors, they could be certified individuals, or they could be the folks that own or operate equipment. Client, duty holders, kind of same thing. It really is the people who are directly connected within the safety system.

APPELT: Perfect. Thank you.

KRETSCHMER: Thank you for calling me out, I think sometimes we get wrapped up, and I'm sure everyone can relate, into your own acronyms and terminology. Yeah, it's nice to reflect on that sometimes. So, yeah, we were looking to see, and in this case, the stakeholders we're talking about, were contractors. We were finding that a huge volume of them were incorrectly valuing their installation permits for a specific type of equipment.

And when we looked into it, it wasn't really that these folks were intentionally being non-compliant. They weren't trying to undervalue the permit to try to skirt the system or pay less money. When we looked into it, we found that the field that they needed to enter in order to produce the fee calculation, actually used a metric that wasn't commonly used within the industry itself. They were entering the values that they would normally, based on the equipment that they had, and our system wasn't necessarily translating that when it was calculating the fee.

We also identified that the categories where they would have to choose what type of equipment they were installing, the terminology and how they were labeled was kind of confusing. And in one case, we said like multi residential building, which would be something like a condo or a townhouse. But what the requirement was, is that they would actually have to get a commercial level just because of the energy output. And so, long story short, it was very confusing for people when they were trying to select which type of permit they would need to get. We kind of took that away, and we realize, “Hey, there's some opportunities here to do some

simple changes to our permit application process to make it easier and nudge people in the right direction to purchase the right type of permit".

We made two simple fixes. One, we added a validation field, and reflected the right type of numerical value that they would need to input in order for the field to be correctly calculated. And for the second field where they were trying to select the type, we added more information and we added a pop up that helped guide them through a series of questions to select the right type, rather than asking them to read all the information and figure it out themselves. A lot of the calculation or kind of nudging people to the right selection was happening in the background. And instead, we were just asking people really clear questions that would be easy to answer from an everyday sense.

And so, we implemented those fixes. It was really simple, and we had the support of our IT team, so it was very collaborative between our technical team and our IT team, as well as our compliance and enforcement team. And then we started evaluating the impact of that. We saw a major reduction; I think we went from an average of probably about 50 of these that we were picking up per year to almost zero. We saw a major reduction in the number of folks who are actually going through the enforcement pathway, which was saving them time and money and also their experience with us, and was allowing us to reallocate the time that our enforcement team was spending, enforcing against these cases on cases that were really cases where people were intentionally trying to circumvent the system. It really allowed us to optimize our resources and avoid sending people down an enforcement pathway that didn't need to go down there.

APPELT: That's such a great example of a win-win where it was helpful for everyone. It helped the duty holders, it helped Technical Safety BC, helps people with safety. I think that that's a really neat example.

KRETSCHMER: And it was like almost zero cost. We just had to spend a little bit of time. There was some IT development time, just as we had to test and put things into production and make sure there wasn't any, you know, unintended consequences of making the change on other systems. But that only took a couple of weeks. It was almost no cost. It was just the time for us to actually really dig in to what the problem was, and to come together and develop a solution.

APPELT: That's great. And I was wondering, I know a challenge that we often see is you have a project like that that's successful, but then it can be difficult to scale it up so that the insight is applied, not just in a test way, but across all applications of that tool or across other tools that are very similar. Has Technical Safety BC had any successes or challenges with scaling?

KRETSCHMER: I think one of the key elements of being able to scale something is having enough data to show over a longer period of time, in order to give confidence to decision makers that you've truly demonstrated the benefit, and that you've also given enough time to pick up on any potential unintended consequences. Because that's a key thing, anytime you're trying to introduce a change, you want to make sure that your evaluation is sensitive enough to pick up on that. I think that's been a key component.

And for us, I think there's been some simple nudges that we've done where we've been able to scale, but I think one of our unique challenges is that while there are similarities within our technologies, there's a lot of nuances as well. And so being able to apply something from one technology into another technology or another industry area requires additional research and evaluation in order to ensure that the context is similar enough in order to actually apply it and it to have the same effect.

I think we are in the process of scaling up some of the things that we have implemented. One of them, I think, is going to be our ammonia prevention intervention, where we're implementing a voluntary program with

arena facilities across the province and we'll be testing it to determine whether it's something we can scale up for other refrigeration related industries like fish plants or cold storage. I think for us right now, it's really making sure that we're doing the additional evaluation work in order to feel confident that we can replicate results and that they're appropriate to be applied in other areas.

APPELT: I think you raised a really good point there in being careful around the scaling. We want to scale where we have the data to support scaling. But we have to be cautious about scaling beyond the limits of the evidence we have, and I think that's a really good takeaway message, is that scaling has to be done carefully. I think that's also a good note for us to wrap up on. Do you have, as a last question, any advice or a message for our BI practitioners in training?

KRETSCHMER: I think that you're in a well-needed industry, so you are in the right place at the right time. You've got a really strong community here in BC, and I think my main piece of advice is really to continue to promote, within whatever organization you're at, the principles around and values around curiosity, empathy and data. And there's many different ways to do that. But I found that kind of triangle of a value has really been critical to organizational change within our organization, and even just kind of looking at other organizations in BC that have successfully adopted BI, So, stick with it. You're in the right place. And we need you.

APPELT: I love that. I think we need to translate curiosity, empathy, data into Latin, make it our crest and go from there.

KRETSCHMER: And make some cool, Harry Potter-like sweaters.

APPELT: Exactly. Thank you, Kaylyn. As expected, it was a lot of fun talking to you. And I always learn a little bit more about what Technical Safety BC has been doing, and it's just, like I've said already, it's been really exciting to watch the journey that the organization is on. And I think our listeners say will have a lot of takeaways about how to think about BI within their own organization and ways to expand its use. Thanks for joining us today.

KRETSCHMER: Thanks for having me, Kirstin. It's always a pleasure. And looking forward to the next episode of the podcast. I'm now a dedicated listener.

APPELT: Awesome. And thanks to our listeners for joining us for another episode of Calling DIBS.