# Episode 22: "Collaborating with BI Project Clients"

*with Michael Buttazzoni, Scrum Master with the Information Management Branch serving the BC government's natural resource ministries.*

*As one of the founding members of the BC Behavioural Insights Group (BC BIG), Michael Buttazzoni has a number of BI projects under his belt. Michael shares some of the ups and downs of client management, with a particular focus on challenges and strategies for collaborating on BI projects across ministries or divisions. Since Michael has recently moved onto a new role in a different ministry, we also discuss ways to integrate BI knowledge and the BI skillset into roles that are not primarily "BI jobs".*

*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 Michael Buttazzoni, Scrum Master in the Information Management Branch serving the BC government's natural resource ministries. And I'm really glad we have Michael on the podcast today. I've had the pleasure of working with Michael during his time at BC BIG and as BIG's second employee, he really helped grow the unit and welcomed all of us and got us all up to speed. And he's only recently moved on to his new role, so I'm thrilled that we have this chance to catch up. So welcome to the podcast, Michael.

MICHAEL BUTTAZZONI, GUEST: Well, thank you kindly. Pleasure to be here.

APPELT: Can you start out by just telling us a little bit about yourself?

BUTTAZZONI: Sure. Yeah. Nice open-ended question. I kind of grew up as a privileged music kid in suburban Ontario. I came out to B.C. when I was 19, on a road trip, started at Canadian Forces Base in Gagetown. Came out here with a few friends. I saw the mountains for the first time. Kind of fell in love, then went back to Ontario and kind of lived there miserably for a few years. I did my undergraduate and graduate degrees at UWO, it was my first graduate degree. It was in policy and history. I think that's where I started to pick up on, I have maybe some tendencies towards realism and utilitarianism that'll probably spring up throughout this interview a few times.

I spent some time living abroad. I've lived in France, South Korea, Italy, Northern Ireland, and I moved to Victoria. After teaching English in Korea for a year, I was kind of drawn here by the research one of the local academics, Dr. Emmanuel Brunet-Jailly, he specializes in the administration of Borderlands. That really caught my attention. I did a few research projects on natural resource development in the Yukon and the potential impacts of then future Brexit in Northern Ireland. And yeah, from there it's been fun and games at BIG and sort of transitioning from the academic world into the public service here in Victoria.

APPELT: Great. Such an interesting background. So, you initially started at BIG if I'm not wrong, as an MPA student, I'm wondering how you got matched with BIG or rather, I should say, with Heather, because at that point, it wasn't a behavioural insights group, it was just a behavioural insights person.

BUTTAZZONI: It really was. Yeah, it was through the co-op program. I think if I'm okay to put a small little plug out there for UVic on a UBC podcast, then I'll just say that the co-op program is probably one of the big strong points of the MPA program at UVic. And that's that was sort of the locus of how I got connected to Heather. And Heather called me first thing in the morning. I think it was on a Wednesday. And I just took the position out of hand because it was really interesting. And then there was another offer that was about four hours behind it. So there was a fair bit of luck involved in that kind of matching at the time.

I knew I was kind of interested in the application of psychology to public administration, but I don't really think I knew entirely what I had signed myself up for with building out like a new government unit. You know, it really was just Heather, at that point. So there was a lot of ground to cover in front of us.

APPELT: Absolutely. Yeah. That sounds like Heather being the early bird getting the worm.

BUTTAZZONI: Oh, yeah, definitely.

APPELT: You mentioned that you're interested in the application of psychology. So how much exposure to behavioural insights did you have prior to joining BIG?

BUTTAZZONI: To be honest, very little. I had bumped into behavioural economics through some of my coursework at UVic, but I wasn't really aware of that trend of public administration, behavioural insights or experimental public policy, all that kind of stuff.

I think the federal government in Ontario were really like, they were about maybe a year ahead of B.C. in adopting it. So, there wasn't a lot of talk about it in my graduate degree at UVic. There wasn't a whole lot of attention being paid to it by my professors. But that's kind of changed now. I think I've taught some of those classes there. And Heather and I have helped to kind of introduce and socialize these concepts to some of the next generation of public servants coming in.

APPELT: Absolutely. So obviously started with BIG as part of that co-op, and then you stayed long past your initial kind of co-op rotation. So what led you to stay with BIG?

BUTTAZZONI: Oh, man. Couple things. I mean, for one, the challenge of the work and I guess like the people that you get to work with, that's kind of the big thing about any kind of work environment is so much of it is defined by who you work with. And I just remember, like being blown out of the water by Heather's energy, and the connections that she had all around BC government, not just BC government, but within municipalities and federal government. She's quite a networker. So that was a lot to take in.

I remember meeting, you know, yourself and a few other professors from Sauder on a trip to Vancouver. I remember being astounded by Ashley Whillans, I think my first colleague that wasn't Heather on the team. She worked with us for maybe a year before she headed off to Harvard. And then, every colleague I've had since then, at BIG, both internal and external, has been just a real gem. You know, people that I can learn from academically, professionally, and the current staff are definitely included in that. I've learned so much. I think that's kind of kept me intellectually curious and that kept me coming back to the, you know, to the environment there.

And on the work side, yeah, definitely the challenge. Like BIG's mandate is kind of a clarion call to improve government. It provides a method to try to begin fixing some of the dysfunction and, you know, not entirely great services that people endure with government on a daily basis. So, not only was a chance to work with brilliant people, but it kind of gave me a roadmap, I guess, sort of for my career, for making an impact on government policy and services. That impact, making a tangible, quantifiable difference. That appeals to me pretty deeply. And I think that's-- I think that's kind of what catches the imagination of a lot of other young public servants with the BI work. You can see the difference that you've made quite tangibly.

APPELT: Absolutely. Yeah. I love that you can see the impact you're making on others. But then, like you said, there's also the impact on yourself where you're continually being challenged and you're learning from the projects, you're learning from the colleagues. So it's just very rewarding on multiple levels, being involved with the group.

BUTTAZZONI: Yeah, absolutely.

APPELT: Well, as we already mentioned, you are part of the origin story of BIG, and I think your job title evolved over time, but the most recent version of it is Methods Specialist. Can you tell us a bit about that role?

BUTTAZZONI: Sure, yeah. Gosh, I think it is kind of the catchall role for general project management, clients, management, and I think, depending on the exact configuration of staff, resources, often the kind of qualitative research specialist role. That role has a lot to do with setting up projects, getting them running. And it's done, you know, in conjunction with the behavioural scientist. The behavioural scientist is sort of the skill set that kind of is responsible for building the experiments and for analyzing the data afterwards.

I think that that kind of encompasses the method specialist role. It's a lot of client management, a lot of project management, liaising, organizing, and sort of facilitating the front end of the RIDE model that they have at BIG with workshops and sort of research activities, of a more qualitative nature.

APPELT: Yeah, and that is a perfect segue, because one of the major topics I wanted to chat with you about is client management, because the students currently are working on their Capstone project. And one of the wrinkles that they recently encountered in different teams, in different ways, is the various ways that client management can go more or less smoothly. I know you've had some experiences there, and we don't want to name specific projects, but can you tell us some of your, quote unquote, "war stories" of client management?

BUTTAZZONI: Oh, boy. Yeah, think for a second here. I mean, any time that you have government agencies collaborating across organizational lines, things can get pretty complicated in the client management category. And this is you know, I think there is a recognition in the B.C. Public Service that the old style of sitting in your organizational silos and not really playing with the other government, you know, ministries or resources, that's the old way. And we need to sort of shed that for the betterment of our public services. But in reality, these organizations often have very different cultures. They often have very different values, and very different interests.

APPELT: Different acronyms.

BUTTAZZONI: Oh, yes. Don't even get me started on the acronym game that really hinders, you know, transparency, all around. But, yeah, those competing priorities, when you've got potentially two ministries that are-- or three ministries or however many, that are co-responsible for a particular program or a service, there's a fair amount of blame game that can start to happen. When there's that shared accountability, there's no accountability. I've heard that before. So that can be really tricky to navigate, if you're trying to solve a

problem or address a problem that are often quite complicated and multifaceted. Having not everybody on the same team, can really lend some complexity and tension to try to move forward with potential solutions. So there's that.

Another big one, I think, is like, trying to get executives and technical people in the same room. Executives often know that there's a problem that needs to be solved. Technical people at the bottom of the chain often know how to solve that problem, and sort of might have a roadmap for moving it that way, but they rarely actually interact with each other. And so, getting those people in the room, and I could go on. I mean, so much to client management.

I mean, there's I think generally in all of the public services in Canada, there is a somewhat maybe a bit of a deficit or a lack of experimental literacy. You know, you've got to bring people up to speed on how to run an experiment. You know, why you can't, you know, maybe use administrative categories as categories for randomization. There's all kinds of things about data that people often don't know.

Personnel churn-- that's another big one we've had on some projects. You'll have upper management or executives that bounce between positions or even lower-level stuff. I suppose I'm a bit of a part of this, too, now that I've bounced on to another temporary position, that can make things really difficult when you're not dealing with the same people over a period of time.

APPELT: Yeah, I think we've seen that in a number of projects where that kind of is something that worsens other issues. So, like you're saying, different priorities, different understandings, and potentially different levels of understanding of things like BI and experimental methods. And then, if you're midway through a project and you have a change of executive, or a change of where that unit falls, or a change in even any level of-- it could just be that the project champion, then you're basically in some way starting from scratch on all of those issues and having to restart all of those relationship building things, of getting on the same page, building that common literacy and doing that in the middle of a project, can mean that the project gets scuttled.

BUTTAZZONI: Yeah, yeah. No amount of documentation will save you from that. When we talk about nudges and tweaks, I think there's a section of the public service that suddenly, like their ears perk up, and their eyes alight. And there are people, I think, who want to innovate without actually really changing anything. You know, the tweaks part of BI often appeals to them the most, I think it's just a simple change in wording might solve some of their problems. Really, I think the method that we propose is substantially more difficult than that. So that's one that kind of gets in the way.

I suppose, you know, at the Behavioral Insights Group here at BC, we are a corporate service, so nobody has to pay us for our services and for our time. And that's something that has kind of caught my eye in sort of the later, my later years with the BI group is that if you don't charge for your services, people maybe tend not to follow through on some of the commitments that they've made. They don't have any skin in the game, financially speaking. And that kind of leads to lots of behavioural advice without actual experimentation.

So, getting your client to the point where they actually want to run an experiment, they don't just want a cool lens or a cool new perspective where they actually want to generate some evidence, that can be a difficult component to client management as well.

APPELT: Yeah, there's a funny part of behavioural insights, that we maybe sometimes miss, where we often use how much something costs as a way to determine how much we value it, and if it's free, we forget how valuable it is. And I know I've been on a project where at one point the client was like, "Well, we can't do this

favour for you anymore". And we're like, "Wait a minute, you're not doing us a favour, we're working on a project together that's going to benefit you".

BUTTAZZONI: I think that's exactly it. Yeah. You hit the nail on the head.

APPELT: So, like we said, some of these issues are just issues, and we just have to be aware of them. But I think for some of them, there's strategies. So, what are some of the ways that you work to improve the flow of BI projects with clients? What strategies have you developed over time?

BUTTAZZONI: I mean, I guess I can claim partial credit for, you know, the development of some of BIG's workflow over the years. Scoping meetings was kind of always my baby. This is like the really preliminary work. It started with just creating a very basic template that I could use in initial meetings with clients or potentially frontline staff to work through whether or not they have the basic infrastructure to run a trial. Because we kind of, we would get into the position sometimes of, you know, we dive into a project, we got very excited, you know, project partners with good executive endorsement.

And we start running some workshops. We start dumping a bunch of hours into, you know, qualitative research. And then we've realized that they don't actually have the data or, they are unable to randomize for whatever reason or, you know, this, that and the other thing. So that tactic, that initial scoping meeting, which sounds kind of clinical, is designed to kind of get to the point of the trial, before investing too heavily in the research and innovation phases.

APPELT: Yeah, I think one of the things that's been so valuable about those is it reminds us that not every project should go forward. So it helps the projects that do go forward because you're getting that information upfront. But it also helps you realize the projects that shouldn't go forward, which I think is, you know, just we all get so excited-- it's a really hard lesson to learn that not all projects are going to be successful and workable.

BUTTAZZONI: Yeah, it's not just about finding a willing partner and an interesting problem. There's a lot more that you need to have in place in order to run a really, like a rigorous trial.

APPELT: Absolutely. Yeah, I think scoping meetings are definitely one of the really key pieces. So are there other parts, other things that come up during other parts of the BI project where you think there's ways that you can facilitate the flow of the project with the client?

BUTTAZZONI: Yeah. I mean, I think kind of related to the scoping and I think I sort of touched on this before, was getting the getting executives and the executive sponsors of a project and the technical people who actually work with the systems. In practice, getting them in the same room can do a lot to move along, sort of, a project process, to move faster towards a trial, to sort of accelerate that workflow, getting that clarity of vision, and clarity of constraints, at the front-end as soon as possible within developing a potential trial.

If you think like during both at the very front during the scoping component, but also during the innovation phases where you're trying to figure out what ideas can we actually put to field and text. Having both of those groups in the room is really, really critical and it can really smooth the process along.

APPELT: Absolutely. Well, beyond client management, there are sometimes other tricky parts of running a successful BI project from start to finish. What do you think, aside from client management, is the trickiest part?

BUTTAZZONI: Well, in government, we have a lot of what we like to call legacy systems, which are dusty old digital solutions that were, you know, perhaps state of the art ten or fifteen years ago, that are still chugging along. Finding workarounds for these ancient systems is definitely a tricky component to running BI projects. It's also, you know, it's been a catalyst for kind of spurring on my own learning in a couple of different areas. But that is, the constraints of existing systems is definitely one of the trickiest parts. And you can't always find a solution to it.

APPELT: And maybe just to spell that out for folks, when you say the systems, is that something that's impacting how you can deliver the solution? What data you can track? All of the above?

BUTTAZZONI: Yeah, absolutely. All of it. Often, government doesn't maintain a lot of their own digital services with developer teams. That's starting to change now in B.C. But a lot of the systems that they used were commercially purchased, and may not have a whole lot of support from the people from the companies that they purchased them from.

It's difficult to put in like change requests, for example. So you wanted to do a big, you know, tax trial, and you wanted to randomize and then send different letters to different people. You know, the typical sort of UK tax trials can be quite difficult to do in practice. If the systems that actually send out the letters that record the financial data, if all of that isn't sort of set up in a way that allows you to run the trial.

So, making changes to existing systems often means you have to put in requests that are often, you know, at the back of a long line of requests. And so, it can be very difficult to actually field a trial if the existing legacy systems don't permit that. Randomization is a big component there, but also access to data that's unlinked, that can be an issue.

APPELT: Absolutely. Well, any other advice for managing tricky multidisciplinary teams on BI projects?

BUTTAZZONI: Oh boy, empathize, I guess. And don't skip the qualitative research. I think that can be a bit of an instinct for some in the field. Really do. It helps to put yourself in the shoes of your clients, and in the shoes of the users of a government service. So, walk their walk, both in terms of the user's experience with a service or program, and also what happens on the back end. Some of the stuff that's invisible to the user. Walk the walk of front-line staff.

And try to do that before you come to your hypotheses, before you come to your ideas of what you're going to change in order to improve things. Try to keep your mind so open that your brain might fall out like, you know, pick it up if it does. This is where QA with your team can be pretty vital. It can be really difficult to understand the internal logics of government and not to get sucked into them so that they just seem natural to you.

It's a bit of a weird line to walk. But as a BI practitioner, you've got to be able to both understand why things are the way they are, and why they function the way that they do, but also be able to see, you know, when it's a stupid system, or what it's a bad idea or, you know, when there's obvious reasons why you might want to change something.

APPELT: Yeah, I think empathy is something that's hugely valuable. And I'm imagining that it's also something you use in your new role. So, flashing forward four years, you're in this new role. You've been in it a few months; can you tell us about your new role?

BUTTAZZONI: Yeah, of course. I am a Scrum Master, which sounds kind of exciting and active. Basically, I helped to lead a team of software developers within government. This is all within the framework of agile software development, which a quick Google search will lead you to realize that it's a method of software production that is organized around a sort of facilitated software development team, that works within regular production cycles, time box production cycles.

So, we work within these two-week sprint cycles. At the end of every sprint, we demonstrate what we've produced to users and to stakeholders. And at the beginning of every sprint, we kind of calibrate for the next two weeks. We figure out what we're going to work on, and how we're going to go about doing that.

Within that process, the Scrum Master is kind of the facilitative leader. So, I help facilitate meetings and all the ceremonies that are part of the scrum process, and I really just try to remove barriers to the work the developers are trying to do. So, in that sense, it's a little bit like my former job in that I'm doing a lot of facilitative events, I'm doing a lot of facilitative work. But it's a little different in that I'm working with one team over and over again and we're building one product over time.  I'm not bouncing between many different clients as I used to be.

APPELT: Well, I think your current role will resonate with students because many of them aren't in stereotypical BI roles, but they're roles where they hope to be able to use BI. And it sounds like maybe you are able to use some of your BI learnings. Is that true? And if so, how?

BUTTAZZONI: Yeah. In a couple of ways. I mean, it's kind of amazing just on an off note, how working in the behavioural insights field sort of changes the way that you look at problems and approaching solutions. So like, within the team, you know, the fact that I'm bringing this behavioural insights perspective has prompted a whole bunch of discussions on how we present data to users, how we calibrate effective warnings or prompts, how we present information about uncertainty, and how we communicate with the users of our application.

So, the BI lens is not one that's really been used before on this team, but A/B testing is definitely a staple of modern development practices. There's a natural fit of methods, but the perspective is, is a little new to them. So that's been helpful. At a larger level, I've been having some discussions with some of the more senior personnel in my area. And the notion of hypothesis driven development has been floating around, you know, the software development world for a while. Maybe a couple of years.

And this really seems to be the sort of nexus between where BI and software development overlap. And that's something that I'm keenly interested in, and I'll be continuing to explore whether or not it's possible to apply that within our context in the natural resource ministries. I think that's both the perspective and a bit of the method that comes from BI that I'm trying to apply in my new role.

APPELT: And so, I'm curious, it sounds really interesting, and I think maybe what some of what you're saying is applicable to other roles, so do you have tips for folks who are in non-BI roles about how to integrate BI into what they do?

BUTTAZZONI: Having the experience on the Behavioural Insights Group kind of conditions you to look for common problems, common easily identifiable components of behavioural problems that you see in government services, in program administration, both internally and client facing, and within software development. Being able to recognize user confusion, being able to recognize friction costs, being able to recognize, you know, some of the symptoms of poor communication, these are all skills that you develop within a BI practice that often easily apply to other roles.

The big one, though, beyond just the perspective, the lens through which you see the world, is the method by which you attempt to exert some influence on it. And that's where experimentation comes in. And if you can, I think it can be really difficult to, that is the most difficult part to apply to other roles, particularly if there hasn't been experimentation there in the past. But coming with that skillset of knowing how to build a robust experiment and how to implement it successfully. You can use that to solve just about any problem. That's sort of the beauty of experimental public policy and behavioural insights is you can apply it to just about anything, as long as you've got sufficient sample size.

APPELT: Absolutely. Yeah. And I think that's a really good, I was going to ask, what are your biggest BI related lessons? But I think you just really encapsulated that really well with the idea of you can apply the BI knowledge to anything that you're working on so that you come to the problem more curious, and that you think about ways that you can use BI to change how it's delivered, whatever it is. And then if you're fortunate, you can do testing that may not always be the case. But I think those are two really, really key elements.

So, I'll end with a final question, which is just do you have a message or final advice for our BI practitioners in training?

BUTTAZZONI: Well, I mean, first one, this might sound a little harsh, but you're going to have to develop some callouses. Thick ones. You're going to have to learn, don't like don't take failure personally. The system really is stacked against you, trying to put experiments into the field within government. The system wasn't designed to do this. It's hard to do. And failures that happen outside of your control, particularly in the implementation of experiments, can and do happen. You know, best laid plans of mice and men and all that. So just be prepared for that psychologically and emotionally.

Be prepared for null results. You know, nobody publishes them, but they happen all the time. And there's a good read actually called *Failing in the Field*, has loads of loads of advice on things that can go wrong with experiments and field experiments. And it's an absolute gem of a resource for anybody who is considering going into the field of BI. And lastly, get to know your team pretty well. Like, get some good quality assurance processes going within your team. If you've got the support of well-trained behavioural scientists and other practitioners with experience, that will go a long way to helping you to excel in that field.

APPELT: I think those are fabulous notes. And it strikes me that it feels like this is one of those German seventy-four-word words where it captures what failure means in this respect, because in English we have the word failure. But in BI, when we when we fail to find a significant result or when the implementation fails, it's not really failing. It's you didn't find what you were looking for. But there's still always learnings whether it's, you know, how to work with this, the system, now. You know what doesn't work. So I feel like we need this word for "didn't work out as intended, but still, is a really useful and valuable experience.

BUTTAZZONI: Yes. Learning failure.

APPELT: Yeah, exactly.

BUTTAZZONI: Yeah, good compound, I know what you mean.

APPELT: Alright. Well, thank you so much for joining. It's been really fun to reconnect, and it's really fascinating to hear about how you're using BI in your new role. So I think our listeners will have some great takeaways about BI projects and non-BI roles. So thank you for joining us today, Michael.

BUTTAZZONI: No, the pleasure is all mine. Happy to be here.

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