



Episode 27: "Everywhere You Look...Is Behavioural Insights"

with Rachel Yang, Market Research Analyst and Behavioural Scientist with Technical Safety BC

A graduate of UBC's Advanced Professional Certificate in Behavioural Insights, Rachel Yang recently started a new role as a Market Research Analyst and Behavioural Scientist with Technical Safety BC. Rachel shares her journey from Marketing to Market Research to Behavioural Insights. In chatting about how Rachel is applying her growing BI knowledge and skills to her new role as well as to everyday life, we talk about how, the more you know about BI, the more you see it, even in unexpected places.

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 Rachel Yang.

Rachel is a Market Research Analyst and Behavioural Scientist with Technical Safety BC. She's also a graduate of the Advanced Professional Certificate in Behavioural Insights. Rachel was a fantastic addition to our pilot cohort of students last year, and now I'm really excited to see her blossom into a new BI role that she started just after completing the certificate. And today, I'm really happy to bring Rachel onto the podcast to hear about her ongoing BI journey. So welcome to the podcast, Rachel.

RACHEL YANG, GUEST: Thanks, Kirstin. Happy to be here.

APPELT: Why don't we start by having you tell us a little bit about your BI journey from BCom student to market researcher, to BI researcher? Where did your interest in behavioural insights begin?

YANG: So, I'll throw it back a little. When I was a kid, I was pretty quiet and observant. You know, I would watch family members and friends, and I was always fascinated by human behaviour and especially the way that some things didn't actually make sense. So why did that person say they're trying to lose weight, but they're eating cheeseburgers and fries or like or are they going on shopping sprees when they're trying to save money? Things like that.

And it was really through these observations that I determined for myself that human behaviour is kind of a gamble. You know, like just because you say something, it doesn't mean that you mean it or that you'll follow through with it. I guess now, I know that's called the intention-action gap, as we learned. But at the time, I was just noting down some of these, you know, big questions in my head, basically. You know, fast forward to university, I was doing my Bachelors of Commerce, and it was when I took the Consumer Behaviour course with David Hardisty, actually, who's teaching for the BI certificate, that's when things really started to click for me because I found myself really engaged in the class, you know, constantly raising my hand to participate, actually reading the textbook when that wasn't always the case in other courses. So that definitely sparked my interest in the fields of psychology and BI before I even knew what those terms really meant.

And I also read the book “Thinking, Fast and Slow” by Daniel Kahneman during my undergrad, and that really kept my interest going as well. But to be honest, in my undergrad, I had no idea what practical route I wanted to pursue. I was interested in marketing, but I felt that the field was made to look so narrow to students, like there were there were three paths, either you go into brand management, ad agencies, or the very elusive field of market research.

So after talking to some people, I actually noticed a link between market research and the social sciences, and I realized that it was a great combination of both the quantitative and qualitative for me being a quant researcher, because you needed the technical skills to analyze data, but you also got to flex your creative muscles when building reports or proposing research approach. So after undergrad, I ended up working for Ipsos Global Market Research Firm for five years, and that's really where I built my technical skill set. And now, after having taken the program, I guess I could say I'm a BI researcher, too.

APPELT: Yeah, for sure. That's great. I really love that story. And it's funny I feel like parts of it, you know, everyone has their unique journey, but I feel like there's a lot of commonalities between us where we're just like “Things aren't adding up, what was going on here? I want to know more”. So, I feel like you've already told us a little bit, but what specifically led you to go for the Advanced Professional Certificate in Behavioural Insights?

YANG: So that sort of interesting or interested feeling that I had in my undergrad, I kind of kept that in my back pocket because I thought it was something I'd like to come back to someday. And so, when I heard about the certificate program, you know, I found out who the faculty were, what kind of work we would be doing, it all really spoke to me. Plus, there was the practical and logistical aspects of the course, you know, not being too long, the ability to do it part time while I was working. So, I decided to kind of apply on a whim and managed to land a spot in the first cohort.

APPELT: Awesome. And I'm curious because you were in a market research role when you applied and like you said, you had already started to build, or already had quite a firm quantitative skill set, so what were your goals in taking the program?

YANG: The biggest draw for me was the ability to work on the capstone project, so a real-life scenario where you could actually test these concepts in the field, because I'm always the one who's asking, you know, “What are the steps that need to be done or how would we actually execute this?”. So, the hands-on approach was really attractive to me. And I wanted the experience of taking a project from start to finish and really understanding how that whole process works. And I also wanted to refresh myself on some BI concepts and even the statistical analysis, despite having some background in those areas already.

APPELT: I always find that stats, of course, are a general transferable skill, but we do use them slightly differently in different fields. So even if you've been using them in market research, you might use them slightly differently in a BI project. So now that you've completed the program and thinking back, what were some of the highlights of the program for you, it sounds like the capstone was one of the main things you were looking forward to.

YANG: Yeah. So definitely working on my team was the main highlight. I'm lucky that we had a really strong bond and we were all passionate about our capstone project. I would definitely recommend to the students leaving sometime during meetings for fun icebreakers or starting a group chat where you can just have casual conversation. I also really loved seeing the project progress from just an idea to the planning, to the analysis, and then eventually to reporting on the results.

APPELT: Yeah, and you three really had such a strong team from start to finish, so it was really exciting to watch you. What were some of the areas you found challenging in the program, if there were any?

YANG: Yes, so two things. One that I still question today actually is sort of how to know which approach or behavioural insight to test in a specific scenario. There are so many concepts, you know, so many nuances to each situation, it's sort of difficult to know right off the bat which direction you should go.

And I mean, I guess that's where a thorough literature review, secondary sources comes in and then, you know, up front exploratory research if you can, and then, you know, while that's all nice in theory, sometimes it's harder to get all those steps in during a project when people are expecting answers right away sometimes. So that's one thing I sort of found challenging until this day, I still think about a lot.

APPELT: If I can just jump in there, I just want to add, I think that's also one of the challenges when it's a field project, because if it's a lab project, you can often iterate and test a number of different solutions and then, you know, hone in on something and then go further. But with the field project, you often have only a single or a couple of shots to get something done. So you don't have that time to test all the solutions and winnow down. So, I absolutely agree that that's one of the main challenges of field projects.

YANG: Yes, for sure. And the other thing that was challenging was trying to explain our capstone results, which were a bit puzzling and unexpected.

APPELT: Yeah, analyzing and interpreting results, especially when they're a bit complicated, is always a challenge, that is for sure. And now that you're a few months out of the program, and you've had some time to reflect on highlights, it was great to hear about that. I'm also curious if there are any particular lessons or concepts or other experiences that really stayed with you.

YANG: Some others on the podcast have said this before, but I think just the planning piece, setting expectations up front, being able to explain the whole process to stakeholders. Those are some things that I really took to heart. Luckily, the stakeholders in our capstone project were ready to accept any result. But setting expectations is always useful so that, if there are any surprises, you know, it's not as big of a shock.

Another lesson I've been coming to terms with is the plain fact that your interventions don't always work, no matter how much planning you do. In the course, in books, in the media, we read about all kinds of success stories. So, this program helped save millions of dollars or thousands of people received the care they need. But real life is messy, and things are not always predictable. So, I feel there's a level of acceptance of the unknown that you need that in this line of work, I think.

APPELT: Absolutely. I think that's one of the things we always struggle with is like, it seemed like it would work, why didn't it work. And then sometimes you have the data to kind of puzzle through some of it. And sometimes it remains a mystery. But it does really underscore the value of that experimentation because sometimes we're just so confident it will work, and then it doesn't, or it works differently than expected. So definitely something that is tough to deal with but really underscores the value of experimentation.

Well, since May, you've been working at Technical Safety BC and we have had someone from Technical Safety BC on the podcast before, but for folks who are unfamiliar, can you tell us a little bit about Technical Safety BC and what they do?

YANG: Yeah, so Technical Safety BC is a not-for-profit safety regulator in the province, so we oversee the safe installation, operation, and maintenance of technical systems across the province, ensuring that, you know,

these equipment and systems are compliant with acts and regulations. Everything from elevators to ski chairlifts, roller coasters, boiler pressure vessels, like all these things that we actually interact with every day, but we just don't know it. So the organization is trying to reduce safety hazards and incidents as much as possible.

APPELT: Thanks. That's a good overview. And yeah, I'm always surprised at how Technical Safety BC is all around us and we just haven't realized it. And I've had the great pleasure of working with some of the folks at Technical Safety BC, and I've really enjoyed seeing them build a BI practice into the organization. How does your role fit into that? What do you do in your role as a market research analyst and behavioural scientist?

YANG: I'm still familiarizing myself with the organization, just three months in, but so far, so I've been working on some internal data analysis and some desk research or secondary research. But there might be an opportunity to work on an experimental trial this year, actually, testing nudges to try and increase the uptake of electrical operating permits, which are required to ensure that certain electrical equipment is compliant and to prevent those safety risks.

In terms of how the role sort of fits into Technical Safety BC, as a whole, and its BI practice, the organization is really interested in behaviour change and human-centered design right now. And the team before me has set up a really great foundation with some early wins applying BI principles. And I'm actually the first person to be in this role, so I feel like I'm really helping to lead the BI practice within the organization. And there is so much opportunity to use BI here, you know, through different products and services, or different technologies and departments. And I'm just really excited to be part of it.

APPELT: Yeah, it's so neat to see that it's this new role and that you're able to help create it, and what I always think it is neat about Technical Safety BC is there's all these technical systems, but of course, the technical systems don't just arise on their own. They're designed and used by humans. And so that interface, like you said, just has so many opportunities for behavioural insights.

YANG: Exactly. It's the people that make the systems right. They don't just appear on their own.

APPELT: Yeah, exactly. So, this role opened up in the spring as you were working your way through the second half of the certificate. What drew you to the role?

YANG: Early on in the BI program, I realized I wanted to pivot more into the BI field because it really fascinated me and, you know, I did really appreciate all the skills that I learned at Ipsos doing market research consulting, but it was time for a change. And deep down, I wanted to do something meaningful and contribute to a positive outcome or nudge for good, as we say. And Technical Safety BC had a very strong vision of safe technical systems everywhere. And the role was intriguing in that people at the organization seemed to already believe in the potential of BI. So, you didn't have to convince anyone that it was valuable or that they should invest in it. And it was an opportunity to be part of a very important transitional period for the organization. So I just really liked that the work that I do could have a positive impact.

APPELT: Absolutely. That's always so rewarding and like you said, it's really neat that you get to kind of get in on the ground floor and help Technical Safety BC discover what they can do in this space. So other than hearing about the role via the program, are there ways that you think the program helped you apply for and secure the role?

YANG: I hope the faculty will be happy to hear this, but the program was extremely helpful in helping me land this role. So firstly, the position that I applied for was looking for someone with experience in behavioural

insights. So, unless you've done academic research or you're working on your PhD, that kind of experience might be harder to come by in some cases. So the program was really invaluable in that sense.

I was already pretty confident in my quantitative analysis and project management skills from my previous work experience, but if I didn't have that experience already, the concepts learned in class are super helpful and even down to the job interview, some of those situational questions where perhaps you might run into the challenge of the project or an internal stakeholder. What do you do? Like these are all the things that we've discussed in the course. And we also got some great tips from all the faculty who have had a lot of on-the-job experience. So, Kirstin, you did good.

APPELT: Yeah, that's good to hear. I'm glad that you were all able to benefit from the misadventures we've had with various projects over time. That's great. And now that you've been in the role for a few months and I realize it is only a couple of months, do you find yourself using the ideas and skills from the program now that you're more into the role?

YANG: Absolutely. When I actually think about it, I use so much BI in my everyday life, things like "How can I simplify this email to this person I just met?". Or, you know, providing a checklist when I'm asking someone to complete a task or even like subconsciously critiquing every form or sign that I see, like, you just can't unsee it at this point. And in terms of skills, yes, I feel like I'll be using my own version of the RIDE model on every single project I work on. So the content is highly relevant for what I'm currently doing.

APPELT: I love that you brought up the curse of now you see all the issues with forms and signs and all that.

YANG: Yes, yes. And you realize that some things don't have to be overhauled. Like some things. You can just make a simple tweak that will make life so much easier for the people that you're trying to talk to.

APPELT: Absolutely. And I think it's also interesting because, like you said, it is a struggle to do it. Like I always find myself overcomplicating emails and then I have to take them in and say, okay, no, they don't need all of that information. Just get it down to the key points. So even knowing the concepts, it's another thing to get them into your habits and use them all the time. So as you continue to settle into your role and now that you're kind of looking ahead, you're kind of into the role, you're feeling settled, how do you hope to use BI in the long term in the role?

YANG: I want to try and integrate B.I into as many projects as I can, so my hope is to work on more experimental trials, of course, if I can. If there are situations where it's not possible to run a trial, I'd like to at least incorporate some sort of BI learning whether it's providing feedback on a piece of communication, or on the design of a new platform or interface, I think BI can just be used in so many places.

APPELT: Yeah, and I really like how you brought up that distinction between the two types of undertaking. Sometimes we are able to do the full experiment version, and sometimes it is just integrating a bit of wisdom from the field about, you know, we can just simplify this here. We can just tweak it a bit. So are there things you're excited about in behavioural insights, whether things you're reading, things you're listening to, ideas you've heard, what is exciting to you in BI right now?

YANG: I'm excited just for more industries to use by for good. Initially, I didn't necessarily think about an organization like Technical Safety BC, using BI, but it actually makes so much sense. And I think there's tons of opportunity out there to make it impact using BI in areas that we haven't even thought of yet. So that's sort of what excites me about the field.

APPELT: Yeah, absolutely. Seeing it continue to work its way into industries and niches that we haven't thought about and just learning about, like prior to behavioural insights, I had no idea with Technical Safety BC, so I think that's definitely something I'm excited about as well. And in our local BI community here in the BC area, are there things you're looking forward to as the community continues to develop and grow?

YANG: I'd like more networking opportunities, maybe small breakout groups or like, dare I say, in person happy hours to catch up just on what people are working on, what innovative research approaches or designs are coming across, just more general knowledge sharing, and keeping in touch with this growing community. That's sort of what I would like to see in the future.

APPELT: Absolutely, yeah, I think we had some plans along those lines, prior to COVID-19.

YANG: Pre-pandemic?

APPELT: Yeah, but hopefully we can resurrect some of those. We have meet ups always on our "to-do" list, but then it keeps getting punted. So hopefully soon, soon. Well, this has all been fascinating, so maybe I'll ask you a couple of last questions, one is, do you have a message for our new BI practitioners in training?

YANG: Just enjoy the ride.

APPELT: Pun intended.

YANG: Yeah, exactly. Things might feel a bit uncomfortable at first. You'll be learning a lot of new things, but it'll be such a great experience. And I think you'll be able to incorporate BI into whatever you do, even if your job isn't a formal BI role.

And another thing is something that I sort of struggled with coming into my new role as well is, you know, sometimes it's not always possible to run a trial or have things extremely scientifically precise or planned out. And I think for me, that was a bit of a shock at first, because you come out of the program like having all these great skills and you're like, "I'm ready to run a trial". But there's a lot of other constraints or things that might not make it possible to run a perfect trial. So I would just say work with what you have, do what you can and get as close to it as possible. So just have fun, prepare for the unexpected and of course, nudge for good.

APPELT: I think that's a great note. I think, like you said, it's just there's so many technicalities, everything that needs to come together for a trial to be successful, and it just not always possible. But like you said, there's usually something you can do there, even if it's not a trial. So I think that is a great note to wrap up on. Are there any last thoughts or questions I should have asked and didn't?

YANG: No, thanks, Kirstin, for everything that you continue to do and good luck to the students.

APPELT: Great. Well, thanks, Rachel. It's been such a treat to reconnect and hear how you're continuing your BI journey. And I'm looking forward to your future contributions to our community. I think we all expect big things from you. So thank you for taking the time to chat today.

YANG: Thanks, Kirstin, I enjoyed it a lot.

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