



Episode 34: "BI Certificate Challenges, Rewards, and Tips"

with Cassandra Bernard, Senior Specialist, Innovation, with the Canada Mortgage & Housing Corporation

Cassandra Bernard is a Senior Specialist in Innovation with the Canada Mortgage & Housing Corporation as well as a graduate of UBC's Advanced Professional Certificate in Behavioural Insights. In recounting her journey from her first exposure to BI to using her BI knowledge and skills in her work today, Cassandra shares helpful tips for program students, considers how BI fits into the innovation toolkit, and tells us about an exciting new project combining the topics of BI, inclusion, and housing.

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 Cassandra Bernard. Cassandra is a Senior Specialist in Innovation with the Canada Mortgage and Housing Corporation. She's also an alumnus of the Advanced Professional Certificate in Behavioural Insights.

Cassandra was a fantastic addition to our program last year, and I'll say it for anyone who's familiar with the program, she's a real whiz at Kahoot quiz games. So today, I'm thrilled to check in with Cassandra and hear about how she's using BI post certificate. Welcome to the podcast, Cassandra.

CASSANDRA BERNARD, GUEST: Thanks for having me.

APPELT: So I was wondering if you can start by telling us a little bit about CMHC in your role as a Senior Specialist in Innovation. I'm guessing for most folks, all of those words will be unfamiliar, so it would be great to hear a little bit about who you work for and what you do.

BERNARD: Definitely so CMHC or Canada Mortgage and Housing Corporation, it's usually recognized as a mortgage loan insurance company. I mean, we are a crown corp and that tends to be the most common way people hear about CMHC.

But in 2016, we actually announced a national housing strategy, which is like a decade long, 70 plus billion dollar program, really looking to bring people together, bring communities together and create partnerships with the goal of providing funding for affordable housing solutions across the country and mostly to help during construction and rent out. And also, well, I was excited about it, but in 2019, we announced our 2030 aspiration or big, hairy, audacious goal as our former president like to put it, which was and still is, that by 2030, everyone in Canada has a home that they can afford and that meets their needs. So we're really, really focused on trying to get appropriate housing for people. It's a tall task. It's complex. There are a lot of issues across Canada. And so that's what we're kind of tackling.

And I'm part of the innovation team, as you mentioned. I consider myself a bit of an innovation generalist. I don't have an extensive background in it, but I've learned a lot in the six years that I've been part of the innovation team at CMHC, which is actually from its inception in 2015. And we had over the years been trying

to change culture at CMHC to be more innovative, to help give employees tools, to be more innovative, to do more experimentation, prototyping stuff like that.

We recognize that to reach our aspiration, we would have to do things differently, you know, that proverbial think outside the box and work with more external partners. And our team is very focused on that. We've kind of shifted away from trying to change culture explicitly to just being more market focused, being more externally focused, recognizing that we need to work with others to develop solutions to housing problems. And so that's kind of what my role is as part of our innovation team, working through the innovation process.

So from the beginning of research, exploration, running through prototyping and essentially our team kind of ends scaling. So we wouldn't actually do that. We'd figure out who would be best positioned or, you know, equipped to scale a solution that we've tested and prototyped. And we want to just create, build the case to have something scale that can have a real impact on people in Canada and helping us just develop those solutions we might not have thought of or wouldn't have developed with partners in the past. So, yeah, that's kind of my role on the team.

APPELT: That sounds so interesting. And I usually start out with the flip of asking about you, but I thought it would be really good to situate it within Canada Mortgage and Housing Corporation because from my understanding, that's kind of how BI first landed on your radar. So now that we have an understanding of where you are working, maybe you can give us an understanding of how BI did land on your radar and where your BI journey began.

BERNARD: Yeah, so honestly, I hadn't really heard of BI before dabbling in it, probably, I guess I would consider it at a distance, about five years ago. So I think my first actual taste of BI was attending a conference in Ottawa the Conference Board had put on, and it was a number of speakers that presented case studies from their work in nudge in public service transformation efforts. And I was really fascinated hearing about the intersection of innovation, behavioural insights and work in the public sector. So that was there.

And I came back to the team, came back to my manager just talking like, "Wow, there's so many things we could do or we could change things using, you know, these kind of techniques or just consider how this could be applicable to our work". And so that kind of happened at the same time that we were trying to build this cultural change that our team was leading. And we wanted really to create this culture that supports innovation.

So we tried a number of different ways of doing that. You know, some with mitigated success, I would say. But the use of behavioural insights was actually one of them. And we worked with consultants from I think it was, well, Doblin, which is an innovation branch of Deloitte and actually also with the Behavioural Insights Team a little bit as well in Ontario. But yeah, we tried to develop an approach considering behavioural insights, and that was really where I got my hands dirty and started hearing the different language, the different ways that you could approach culture change and changing behaviours using this approach or these techniques. So that's where I kind of knew, like, "Yeah, I really want to pursue this. What else can I learn about that?".

APPELT: And so that's probably starting to answer my next question, which is what led you to apply for the Advanced Professional Certificate?

BERNARD: So as part of our annual professional development planning, I would say that all employees do this, and we talk with our managers and figure out if there's any type of training or learning opportunities that we want to look into for the upcoming year, and I knew that BI professionals had spent years in higher education and that this is like a long journey, if I were to look at this as something that I really wanted to dive into and

come out with a PhD and really be in that world. But I was hoping that something existed for employees, you know, especially in the public service, like someone like myself who wanted to add a tool to my toolbox, not quite knowing how extensive the training would need to be to at least be able to apply basic principles to it.

So I was looking into courses that offered BI, you know, I was Googling them, looking for things that were available in Canada using different keywords and again, not being ready for an eight plus year commitment. I wanted something more than just, you know, a three day boot camp, some are three days, some are a week, that are really just intros and giving you a high level, I guess, a high-level overview of what BI would be and how you could apply it, and having taken courses like that for various different approaches in the past, design thinking, innovation facilitation, I know that it can be helpful, but if you really want to be able to apply something and use it regularly, you need a bit more training.

So when I came across UBC's poster I was like, "Holy jeez, this is exactly what I'm hoping for". And my manager did not hesitate at all in allowing me to sign up. Our VP was supportive as well. Everybody actually was pretty excited to see where this could go, and how I could bring this to our team, bring this to CMHC as a lens to look to solutioning and just developing our projects. So here I am. And yeah, it's been exciting.

APPELT: Yeah, that's great. Yeah, and I love what you were saying about how, you know, those three week, one week, three day options, they're really interesting as a first taste. But if you actually want to use the tools, that's almost enough to be dangerous where, you know, like, "Hey, social norms are a thing", but you might not quite use them the right way or you might not have the skills to test the ideas. So I love what you're saying about how there's that sweet spot between those like three days, one week and a seven year PhD or something like that. So getting into the program, what were some of the highlights for you?

BERNARD: It's really tough to answer because I, I enjoyed, I can honestly say, I enjoyed all of it. And so if I'm really breaking this down, I mean, looking at the content and how it was presented, I appreciated having different professors with their different styles coming in, talking about specific pieces that they have really in-depth knowledge on. That was really great and it gave a different flavor every week. So, yeah, that was definitely a highlight for me.

If I'm looking at content and I had to pick one, I think learning about the motivations that push people to behave in a certain way, I find that fascinating. When you think about it, even at a micro level in our day-to-day tasks, having gone through the course and then kind of analyzing and looking and going, "Yeah, okay, you know, things are easier, when they're accessible, it just, it makes a difference". And it does have such an impact. So when you're trying to change behaviours, just adjusting some of those things can really make a difference. So, yeah, that part of it that really, what motivates people, is really interesting to me.

And also just the camaraderie of the cohort, the atmosphere. Like, I was surprised, even though it was completely virtual, it was really fun. It was great to hear about everybody's capstone projects, their wins, their struggles throughout. I think each project was so different. I found it really helped me understand, I guess, the breadth of the application of BI. But yeah, that in a nutshell, those are kind of the elements that I really, really enjoyed throughout the course.

APPELT: Yeah, the same. I would say a lot of the same things for me as well, like what you're mentioning about getting into the drivers of behaviour, I think that's like when you boil it down, that's why a lot of us end up in the spaces where people doing what they do and why aren't they doing these other things. So I know you're not ready for it now, but someday a PhD might be a fit for you.

BERNARD: Could be, you never know.

APPELT: And I would agree that the diversity of folks who come into the program and the diversity of capstone projects are part of what excite the faculty, because it's just so interesting to see the different perspectives everyone brings. Then each year the set of capstone projects are so different. So it never feels like for us that we're repeating it over again, it's always new and different, but at the same time I know that it was a big busy year, so I'm sure there were some parts that were challenging. So what were some things that you found were a little bumpy or just challenged you, pushed you in new directions?

BERNARD: So I know I didn't mention it as a highlight, but it still was, it also comes in as an area that I found challenging, the capstone project itself. Obviously, like it's half of the time we spent on our program, was developing our capstone project. And I think for me, the big challenge was being the only direct connection to CMHC and the client for our small team of three. There was so much back and forth co-development of content, negotiation that was required throughout the whole process, and a lot of needing approvals to move certain things forward and having access to a budget and stuff like that. So I think that was really tough. Like, if I wasn't on the ball, then our timelines could not be met. So that was it was a challenge. But I mean, it kept me on my toes, the team as well.

And in the end, we did pull it together. So it was a challenge, but a worthwhile one and a great experience, a learning experience as well on how many players there might be as you're trying to coordinate something like this, that might sound relatively straightforward to organize, but then you realize there are a lot of moving pieces, a lot of factors and dependencies when you're trying to ensure you're meeting a specific timeline.

So, yeah, I guess timelines were also a big challenge. Specifically, I guess the fact that, I think at work we're used to having, well at least in my workplace, we're used to having deadlines set, but then we move them as priorities shift and we realize like, "Oh, we need a bit more time for this and then it can be pushed out". There was none of that for this project. We knew we had to achieve certain things by certain dates, regardless of internal desire to slow down or ask more questions. It was kind of go, go, go, push it through. So I found that tough and even the time zone difference.

So between myself, because I'm in Ottawa and my teammates were in BC, and so it made it a bit difficult, especially because they have full time jobs. And I was lucky enough, I have to say that the management team allowed me to work on this during my work hours, so I didn't have to do this in the evenings, and they did, like my teammates did. So I speak for them, I think when it was probably a bit more challenging for them. But coordinating a three hour time difference, trying to set up meetings with people was a bit of a challenge. But we did make it work. It was still fun and satisfying to get to the end of it and ultimately present our findings. So, again, challenging, the capstone was challenging. I think it was probably meant to be. But also a highlight. So just to close the loop on that question as well.

APPELT: Yeah, and that's great. And I think a lot of that rings true for all capstone projects that it's, like you said, kind of a pushing, challenging pace. But I think your team had special challenges during your way because the project partner was kind of shifting as things happened, which there was a lot going on outside of the project for that organization as well. And so I think you you've already covered this a lot. But was there anything else about your capstone project experience that you wanted to raise?

BERNARD: I think if I were to do this again or propose a capstone project, I would have hoped that a project could be done internally for CMHC, as you just mentioned, like our client kept shifting. And this was because it was a project that had, it was based out of CMHC, but the client was a startup that we were working with, that we were funding, and so there was that extra layer that added needing to go to multiple people for approvals, for money, stuff like that. And just the fact that the startup as well kind of had their own ideas on what their

marketing materials should be and what they'd like to see. And they still hadn't had a brand. So if I were to recommend something, it'd probably be to go with, you know, something that already exists as a project or a behaviour that you might be trying to change.

Whereas in our case, we were- we're really trying to test the waters on something that wasn't yet set up. I mean, it was still fun. I felt it still applied. We managed to apply our BI learnings to it. It's just it added that layer of complexity that in hindsight could have perhaps been avoided had we opted to maybe go a different route, even with what we did during our capstone project.

APPELT: Yeah, I think you all did a phenomenal job juggling that because it was, for the listeners, there were moments when it was like, "Well, if the branding of this new organization discovers their branding and confirms it by this date, we could launch the trial by this date". But if they only do it by this date, there was a lot of shuffling in the background. And I think it's really impressive that you all still manage to do a randomized controlled trials.

The faculty were all talking about how we had eight teams, seven of whom were able to do full randomized controlled trials, which is a pretty high batting average, like most of our projects on our own side, even outside the program, seven out of eight is pretty good. A lot of times things fall apart before they get that stage. And so for your team to be juggling this evolving brand and organization startup while trying to do a BI project was pretty, pretty impressive. So I was going to ask if you have capstone project advice for current and future students. Sounds like one is to pick a project that is not this brand new, exciting, shiny object, but maybe something that's a little more tried and tested. But is there any other advice for projects?

BERNARD: I do have some advice I can offer, I guess, just coming from my own experience on our project. So, and I would have already spoke to this a little bit, but trying to keep the number of people that need to be involved in decision making throughout the project to a minimum, that can really help you stay on track. Whereas I said that we really had to go to different people to get approvals on different parts of our project. And, you know, in the public service, not everything moves necessarily quickly. So one person can take a week to approve something or requires a lot of back and forth, a lot of explanations just for something that, as you know, as a team we thought was quite simple, straightforward and easy to approve. So it could take more time and just make it that much more difficult to meet your deadlines.

Something else that we found as a team I think really helped was assigning each teammate whenever we had tasks. So each one would get assigned something to do and we had the deadlines to complete those tasks. So it's very important, you know that everybody works together and that we're all pulling our weight on the team and everybody did. I had a fantastic team to work with, and when we needed to pull everything together quickly, it got done. And it made, I think, quite a difference in our ability to actually be successful at getting through this capstone project.

And also don't be afraid to pivot when you think it's necessary. I think that's a big one. If you're questioning where you're at and you're at a starting point and going, "Okay, I think this is probably how we should approach this". And you realize, after digging in a bit more like, "Oh, I don't think now that this is the best approach", but worried about timelines, it's probably going to save you headaches if you just pivot as early as you think it's necessary to do so. So that would be a big piece of advice too.

Also, if you get pushback from the client on the BI approach you've developed and really make an effort to get them on board, try to get them to see the benefit in testing, to gather evidence, to validate the hypothesis, sometimes it might feel like the outcome will be obvious, but you can really be surprised by the results after

you've gone through your testing. So don't necessarily let the client dictate what the outcome should be before you even had a chance to test it. Yeah, it's really important to get through that validation exercise.

Just a couple of more here so, your advisor is your team's best friend in this, if you're feeling overwhelmed, stuck or uncertain, like don't spin in circles, there's no point. Time is ticking. Reach out to your advisor, that's why they're there and finally, I guess, have fun, don't forget, it's about learning and applying what you've learned. So it's so easy to get kind of down the rabbit hole and stuck in the overwhelmingness that might feel like everything's new and you're really trying to accomplish certain tasks. Just remember that this is really trying to get you to learn or apply what you've learned and learn from that as well.

And don't compare yourselves to the other capstone projects when you're hearing about where they're at. Sometimes it might feel like you're far behind and you won't be able to catch up. Remember, all the projects are different. So it's just a matter of being where you need to be at the specific moment in time. And that comes back to talking to your advisor and being comfortable with your progress.

APPELT: I think those are fantastic points, and I'm maybe just going to pull on a few threads there that I thought were really good and I like what you said about pivoting, because I think we often tend to just kind of be like, this is the thing. We're going with this thing, full steam ahead. And then you start to have like a niggling little feeling of like, "Is this the right way? But, oh, we've already decided to keep going". But like you said, if there's that feeling that maybe there's an interest in or a need to change, like exploring that as it comes up, will save you time in the end, like you said.

And in most cases, there's quite a lot of room to pivot until basically you launch the trial, there's always room to pivot. And then I also really liked what you said about the client push back and how often we, like, present the idea. And then the client has feedback and or they come back with something else and we think, "Oh, it's the client, just go with what they said". But a lot of times it's just that they didn't understand the rationale for how something was done. And so it often is an iterative process to help them understand certain things are pretty changeable. Certain things, if you were to change them, it would ruin the exercise. So I find that for most of my BI projects, that is quite an iterative process with the client. It's not, "Here's the BI solution and go!". It's the first step and we'll iterate on it a bit.

And then again, you had so many comments. So one other I wanted to pull on was that idea of the timelines for the different projects. And some projects are able to do their exploratory research in like two weeks. They have a quick survey and it's done. Others take six weeks. And so I think it is really true that you want to focus on the timeline that makes sense for your project and not get hung up on where others are because some teams launched their projects in like January because they had an organizational deadline. Others launched their trials in early April and they had shorter data analysis periods because their data wasn't this, you know, pulling together of 80 different data sets. So it really is based on the project.

And then the last thread I wanted to pull on was just I wanted to underscore that the advisors that is they're there to advise. I really liked your point about reaching out to them. We never want students to just be spinning in circles. Like you said, we're always there, even if it's just to talk something through, talk an idea through. We're always happy to do that. So I love that you brought that up.

And maybe moving on from the capstone project, if I may say you seemed quite comfortable with the materials throughout. You did quite well in all the courses. So I was wondering if you had any tips, how did you approach the assignments and material, were there approaches that you thought worked really well?

BERNARD: Yeah, so I mean, I have to say, the course was I mean, I found the program to be easy to follow. So I think that probably helped. I always completed my readings on time and I always tried to do the quizzes and the assignments as early as possible while the content was still fresh in my mind. So not waiting until, you know, five or six days later before completing the quizzes. So just a little tips like that just really helped me actually do my best throughout this course.

Also a big part of this too, and I think this is even beyond the course itself, was taking detailed notes that were easy to refer back to. I kept in mind that as time passed, I'd be more dependent on the notes that I took, along with them the course material, especially as I'm referring back to it through my work and considering different projects that are coming up, and trying to remember what do I need to do when I'm going through RIDE. And so it's easy to refer back to. So as comprehensive as my notes could be is what I tried to strive for and even go back to them and actually fill them, fill any gaps with anything that came up afterwards or future courses. So thankfully, yeah, today, as I'm beginning to scope a potential project where we might apply BI, it's proving to be quite helpful.

APPELT: I think that's a fantastic tip because I think in the moment we're like, "Oh, this is so intuitive. I'll totally remember this. I don't need to take a note" and then flash forward a week or a month or a year, you're like "So it was something obvious, but what was it exactly?". And I think that's a really good segue. You mentioned there's a project that you're starting to scope. So my next question was going to be, how are you able to apply your newly honed BI skillset at work?

BERNARD: Well, part of it is being an advocate, like I bring it up every chance I can, every chance I get when hearing about opportunities that come up or just, and not even necessarily projects, but just something, working in innovation, I mean, it's really we're working with projects that are at various levels, so, I mean, there might not even be a concept yet, we're working with problems that we're trying to explore and eventually come up with solutions and so trying to think, "Okay could we apply a BI lens to this solution, to this concept that we're developing if it involves a behaviour change in any way." So, yeah, keeping a top of mind as something to consider and bringing it up, using the expressions, using just BI or behavioural insights when I'm talking to my colleagues just to make them more familiar with it and know exactly, might know a little bit about what I'm talking about.

And thankfully there are a couple of colleagues as well who, one of them is a behavioural scientist, and I have another one as well who worked using BI tools in her job as a consultant. So it's not completely foreign language to a few people on the team. So really having those allies as well helps just bolster any thoughts of applying BI and spending the time and effort to dig a bit deeper.

So I'm actually leading some work right now exploring the problem of discrimination in the residential tenant selection process. And we're specifically zoomed in on Edmonton because you may or may not know, but across the country, the rental markets and the way housing is legislated is different. Each province has their own set of rules and own basically residential tenancy act. And so to be able to come up with a solution that we wanted to test, we knew we had to kind of zoom in on an area we chose Edmonton, get away from the Ontario centric, Toronto always gets all the attention. So we thought we'd go out West this time. And really our goal right now is to get to a point where we have a solution prototype that we can test. And where we're at right now is really we just got through ideation and we're developing a few different concepts to potentially move forward, to actually be able to design and test, to see if they could address the problem.

And one of our concepts is actually very behaviour focused. We've already started those conversations on, "Okay, can we bring in BI and do something here", we're looking at trying to reduce discriminatory rental ads on online platforms. Because I don't know if anyone listening has ever tried to look up rental ads or try to find

units for rent and reading certain language, things that say, you know, 'quiet building' or 'great for a working professional' or even as blatant as will or 'must be Caucasian' actually are things that are explicitly sometimes written in rental ads. And these are against the Human Rights Act in Alberta. And so we're looking at how can we actually reduce the amount of discriminatory language in those types of ads, especially since they're technically not supposed to be there in the first place. But it doesn't seem like much gets done to really eliminate it or even try to change the behaviour.

So I plan on using at least the RIDE model to start, but to start with the scoping, very important, and doing some research to see if and how we could even apply a BI approach to this problem. We started digging into it a bit and realized it's quite complex, especially to recognize that there are different motivations that come into play for why landlords would post a discriminatory rental ad, some of them might not even know they're doing so, and others might be doing this purposefully to screen out people that they wouldn't want to receive applications from. So we have to think about that and with the different drivers are, do we want to tackle one specifically or do we want to try to capture all of the landlords that that use this type of behaviour when they're posting their ads? So those are some questions, you know, we have to think about. But we've already perhaps put our cart before the horse.

But looking at some techniques that might be usable, things like signage or social norms, precommitment or even thinking about how we could add friction to make it more difficult for landlords to post discriminatory ads. So we do have a lot of work to do up front, though. And as tempting as it is to dove right into designing a prototype, everything I've learned in my course is really telling me, "No, step back, have a look, scope first, really look at this from an objective standpoint". As excited as I would be to use to apply my BI knowledge here, I really need to take an objective look and evaluate whether it's appropriate here or what type of approach could be used. But in the end, we really want to understand the behaviour, who engages in it and validate where in the process we should consider a BI approach, if we even should. So, yes, we're in the relatively early stages, but excited to be able to even evaluate the possibility of using a BI approach here.

APPELT: That is fascinating. The application of BI to issues around equity, diversity, inclusion and decolonization is an area that I'm really excited about, so I'm excited to hear more about this project as it goes forward. And if I may, a little plug for the BIG Difference conference is actually a talk on equity, diversity and inclusion in housing, so you may want to tune into that one. Well, it sounds like you're definitely able to use the BI skill set. And I was curious if there's any particular concepts or lessons that have really stayed with you that you find yourself using, whether it's in the job or in life.

BERNARD: I guess it's proof of its usefulness, but the EAST framework, I find it so easy to reference and it always pops into your head when you're thinking about this. So, I mean, that framework exists because it is easy, easy to remember. But just applying those thinking about how you can make something easy, attractive, social or timely when you're going to make even the smallest changes. So I haven't necessarily applied it yet, but I kind of laugh inside every time I see an opportunity to change a behaviour, something I'd like to change, I'm like, "Oh, I could really do these things or take these steps and try to nudge somebody or something in that right direction". But I have not done so yet, necessarily in my life or in my job.

APPELT: Yeah. I think I find myself doing the same things. Like if only I could make this little change, then I could get the dog or the husband, or the student to do this thing.

BERNARD: Exactly.

APPELT: And so another thing I wanted to ask about is because you're an innovation specialist, and you have training and other innovation approaches like change management, I was curious how you find those different tool sets coming together. Do you find them to be complementary? Do they work well together for you?

BERNARD: Yeah, I feel that call out to change management is really an interesting one because I hadn't really considered it before. But then I did start thinking about it and trying to compare and contrast, I guess, what different approaches and what the purpose of applying a BI approach or change management, how they are complementary or slightly different. And I do find them to be complementary in the sense that they're both trying to get people to adopt a certain behaviour.

I found, though, that change management tends to be pretty explicit in communicating the desired change and making the change happen through, in our case, in the work that I've done in my training, trying to build awareness of the change, building desire, getting buy in from individuals who are impacted by it, building knowledge and or training on how to adopt that behaviour, and making sure individuals are able to adopt it, and finally, reinforcing that new behaviour. So I can see how BI could be integrated into the different steps in applying techniques to maximize the effectiveness.

But having said that, I think the biggest difference I see, or at least I've noticed, is the lack of choice architecture in change management. In my experience, the behaviour change is meant to be the only option, at least how I've applied change management principles, so much so that part of the reinforcement of that new behaviour is removing the ability to continue with the old ones.

So, I mean, just as an example, the company decides they want to move to Outlook from Gmail, you'd probably announce the change to the employees, give an effective date, all of that kind of stuff. Try to convince everyone why the change is for the better, what's in it for people, build that desirability, offer training on how to use it before you roll out, make sure all computers have access to it and are equipped, and no bugs and all of that to make a seamless transition. But then ultimately they move the email system over to Outlook and remove Gmail from computers to reinforce that change. So employees don't really have a choice, but the company tries to make that transition as painless as possible.

So I guess you could look at how you could apply BI approaches that could accomplish this. And maybe as they're planning the change management strategy, you could test some of their anticipated approaches through a BI lens or approach and see what drives the early adopters to this change and try to leverage what they've learned and tested on, I guess I would say the rest of the population, or even the more difficult employees to convince that typically like the status quo. So I can see bits and parts of it really being applicable. But overall, yeah, I guess I went on about that. But overall, I think that the lack of choice, whereas learning through BI it was more about trying to push in a certain direction, using specific techniques, but not necessarily completely severing the ability to adopt a behaviour that somebody would want to do. So removing that choice.

APPELT: Yeah, that's a really interesting exploration of the differences. I really like a lot of what you brought up. One thing I've seen sometimes, which I think is kind of related to what you're saying, is that the BI project often looks at how to change some external party's behaviour. So like, if you're CMHC, it's like how do we get the landlords to stop doing racist or otherwise discriminatory postings? And then the change management might be pushing that change through the organization. So like having everyone at your organization make sure they're actually using the BI solution. So it's really interesting to see how the two can be complementary, how they might work in sequence or at the same time, I think it's really interesting to see how the different tools all work together.

BERNARD: I guess it really depends on the end goal of what you're trying to achieve and that behaviour change. So, I mean, I spoke of it as if it was black and white in change management. You know, you completely remove the option to adopt a different behaviour. But I think that's just from my experience at CMHC with the types of projects that we've run through change management practice. But yeah, it's definitely complimentary.

APPELT: Nice. Looking at the time, I'm noticing that we are running up against the end of our time together. So I thought I would ask a couple last questions. And the first of those last questions is, do you have a message for our new BI practitioners in training, cohort 2?

BERNARD: My message would be to ask questions, do your readings and look for opportunities to apply what you've learned, really try to absorb as much as possible. You've already mentioned it, so I will double plug the BIG Difference conference. I attended last year, I really enjoyed it. Of course, it was virtual. This year's virtual again. So I'm looking forward to being able to sit in my house from Ottawa and listen to the speakers and hear the lightning talks.

So really, if you have a chance and definitely, you know, attend conferences, look for opportunities to learn about different case studies or just different opportunities that were out there that people have used to apply BI. So, yeah, the more you train your brain to recognize them, the easier it will be to keep what you've learned fresh in your in your brain, so, always looking for those opportunities to think about the different approaches you could use even if you don't plan on doing it, it's really just running those cycles through your brain. Yeah, that would be my message.

APPELT: I think that's a great one. And I find myself, what I enjoy about all the different conferences and seminars is it goes back to what you were saying about the program where you really liked having hearing from different instructors and their perspectives and the way they talk about it. And so when you go to the conferences or the seminars, it's such a diversity of folks that you get to hear a lot of different perspectives and different applications. Well, my final-final question is, are there any last thoughts you had or any questions I should have asked and didn't?

BERNARD: So something just came to mind. I actually just discovered it this week. So the existence of a federal program that's called Experimentation Works is actually meant to encourage public servants to incorporate experimentation into their skills and practice. I know that they have a website that I just managed to go on and skim quickly, but they have, I think, four or five different case studies from different federal departments that used this service.

It's really hands on. It's meant to provide free and easily accessible expertise to the federal government departments. So we're actually hoping, like we're going to look into being able to use their services and they're looking at relaunching. So if you have a chance to look that up and are looking for experts in experimentation, you can look into that and see how they're applying BI as well. So that's something that I'm excited about and I would love to pursue further. So it's just an opportunity to put it out there for everybody to look into.

APPELT: Yeah, that's amazing. I've heard a little bit about it. I think BC BIG has worked with them a bit. And what I find that's often true of our behavioural insights community is that folks are willing to pay it forward and share their knowledge, whether it's the federal government through Experimentation Works or BC BIG having kind of office hours at different times or various things. I think the community is really good about sharing the knowledge and helping others learn as well.

Well, thank you, Cassandra. It's been really nice to connect today and hear about how things are going out East. I'm going to have to bug you offline to hear more about the project and how it goes. That's just such a great example of an opportunity to use BI and more generally, I'm looking forward to watching your BI journey continue. So thank you for joining us today.

BERNARD: Thanks again for having me, Kirstin. This was a great opportunity to talk about what we're doing.

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