Episode 49: "Managing People & Plans to Maximize BI Project Success & Satisfaction"

with Dana Hubackova, Project Manager with the BC Ministry of Children & Family Development.

Dana Hubackova completed UBC's Advanced Professional Certificate in Behavioural Insights to continue building her innovation toolkit, which already included tools like project management, change management, and lean. Dana shares insights about the art and science of project management and her advice for successfully managing BI projects. One of her best tips? Spend time upfront building relationships and plans!

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 Dana Hubackova.

Dana is a Senior Project Manager with the BC Ministry of Children and Family Development, and she's a recent graduate of our Advanced Professional Certificate in Behavioural Insights. Those who know me know I'm a bit obsessed with organization, and I'm excited that Dana is a kindred spirit who is also very good at organization. I'm excited to chat with her today about how that has impacted her behavioural insights journey. So welcome to the podcast, Dana.

DANA HUBACKOVA, GUEST: Thank you for having me, Kirstin. I'm really excited to be here today.

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

HUBACKOVA: Yes, for sure. But before I start, I would like to respectfully acknowledge and recognize and express my gratitude for being able to live, work, and play on the unceded traditional territories of the Saanich peoples in North Saanich on this beautiful Vancouver Island in British Columbia.

I'll start telling you about myself a little bit. I am, like you mentioned, currently working for the BC Public Sector, in Ministry of Children and Family Development as a Senior Project Manager. I have been in my current role for the past four years, and in my role, I work with diverse, cross-functional teams on amazing projects that range from small scale to large scale projects. And those large-scale projects are focused on transforming the child and family services system, because there is lots of systemic challenges. Prior to that, I was working for the LeanBC Office as a selling consultant, which actually started my career in BC Public Sector, and prior to that, I was working in the financial industry for 17 years in beautiful Okanagan Valley.

APPELT: Wow. Well, that sounds like a good segue to one of my favorite questions I ask, which is just the idea that we all have our own winding paths to BI. So given that you've been in finance and you worked with Lean, what brought you to BI? What was your journey to BI like?

HUBACKOVA: Well, my journey started when I started with the BC Public Sector, and it was in 2016, and at that time, the BC Public Service released a new corporate plan that provided action around innovation and

experimentation. At that time, I started to hear a lot about new emerging pockets of innovative practices across the government, new approaches to continuous improvement, the new tools, and one of those approaches was the behavioural insight.

So, at that time, I was working in the LeanBC office as a consultant, and I was supporting multiple ministries that were applying the practice and philosophy of continuous improvement to improve processes. But also, I was facilitating corporate Lean training, and part of that training was to bring attention to different resources and toolkits that will help us with innovation. I just heard about behavioural insights. I didn't know too much about it, so I took the opportunity to attend an introductory presentation on a behavioural insights that was delivered by our very own Behavioural Insights group, that was formed in B.C. Public Service.

I tell you, I was hooked on BI from the moment I heard about nudging, and the results that were based on science, and it was all applicable to real world and the policy problems that we all face. So, I was in, like I was hooked.

APPELT: I love that. I love when there's that "Aha!" moment or that connection, and when that happens, it feels so magical.

HUBACKOVA: Oh, absolutely. It was magical and still is.

APPELT: Well, from that magic moment, what led you to apply to the Certificate program?

HUBACKOVA: Oh, I was always intrigued by human behaviour as long as I can remember, and I always wanted to learn more and understand the reason behind the decisions that we make. I attended the Behavioural Insight program, where I got that additional piece of behavioural insight, and that experience inspired me even further to embark on my BI journey, because I could see firsthand how a simple nudge can create a positive behaviour change, and it can help people make better choices. Choices that are better for themselves, and also, on a large scale, for the world.

The Advance Professional Certificate in Behavioural Insights program was aligned with my career aspirations and my growth as the project manager. My goal was to gain new skill set so I could explore the different ways I was doing my job, including experimentation, problem solving, simplifying and streamlining the processes so that I can promote health, happiness, not only of our employees, but also improve that experience of the citizens and vulnerable clients that we serve everyday across communities in British Columbia.

APPELT: That really resonates with me, and I like what you were saying about this idea of that question of why are people doing what they're doing, whether that person is someone else or yourself, and that that curiosity about why we all do what we do. And another thing that you started to hint at in there is the idea that there's always an application of BI to something. In behavioural insights generally and in the Certificate program specifically, we're applying behavioural insights to a project. And one thing we all know is that in a BI project, work is rarely done alone. It's usually a lengthy, complicated team effort, often involving multiple teams, and from what I've seen in my own projects, and in projects I've advised, project management can really mark a project for success or failure.

It was really exciting to have you in the program last year because of your deep program management experience. I'm wondering if you can tell us a little bit about how all of that worked for you, and maybe we can just start out with the simple: how would you define project management and talk about it as an approach or a skill set?

HUBACKOVA: Oh, I kind of was trying to figure out in my own head, like "What's the definition of project management?", and I was looking at various resources and just found that the application of knowledge, skill, tools, and techniques to various project activities that meet the project requirement. And it's project and management.

So that project management consists of two kinds of areas, and the "project" is how the work is being done, and the "management" is because what various teams work on the project. So how do you manage the moving parts and bring everybody together, so that the work is being done? And so, each project has a definite beginning and end, and in between the beginning and end, there are group of activities that need to take place so the team can achieve project objectives. So that's where the project management comes in.

The project management approach provides us the consistent framework and structure that supports successful delivery of the project. It helps us describe what we are doing, helps us organize in a way so that we know who is doing what activity, where, how, by when, and so that we can complete the project work, by achieving the plans and desired objectives. I really like a statement or a sentence that they read that project management is often considered to be 80% art and 20% science. So here we go. That is part of science in project management that is used in behavioural insights. So, there you go.

APPELT: Absolutely. Yeah, and I think what really makes sense to me is just the idea that it's the framework. So that means that it can be used in different types of projects because it's not dictating every different piece, but it's giving you the structure to organize. And speaking of quotes, the one that comes to mind for me is just abusing a quote from Tolstoy, where kind of, "Every successful project is the same, but each dysfunctional project is different, in its own way".

HUBACKOVA: I love it.

APPELT: Well, building on that, can you tell us a little bit about your project management background? How did you develop that skill set?

HUBACKOVA: Uh, I'll go back all the way back to my school years, and while working on school projects, I realized that I have naturally good organizational skills, attention to detail, and enough stubbornness to get things done, through the ability to troubleshoot and problem solve. When I joined the workforce, after I finished my education, I picked opportunities that empowered people to question the status quo, so that the people were allowed to think outside of the box, and come up with new ideas, and convert those ideas to reality so that we can keep up with this fast-changing world around us. And to be successful, I realized that I need to continuously work on my existing skills, but also learn new skills. And so, everything I was doing was kind of automatic. I think it came naturally from my personality, I guess. But those new skills and honing the new skills came in the picture because I discovered Lean Six Sigma.

And for the people who are not familiar with Lean, it's a set of management practices that align with my way of thinking. Thinking about improving efficiency and effectiveness by eliminating waste. So, I became Lean practitioner and mentor and worked on different projects and started to officially tap into the project management field. I took various project management courses, and the more courses I took, and applied the learnings from those courses this to my project that I was leading and managing, the more I realized that the skillset required to become a good project manager, also included those people-centred skills, the soft, or nowadays I think they are calling them, power skills.

I started to expand my knowledge about leadership style, about relationship building, negotiation, communication, conflict management, and resolution. And I realized that building the relationship and

empowering people were extremely important to the success of any project, because, as we always know, projects bring change, which is lots of times a very complex and difficult process for people to handle and adjust to. So, knowing that part, I also then looked into the ProSci change management and took the training to learn about how to implement successful change in personal and organisational settings.

All these learnings allow me to create a robust toolbox. These various methodologies, approaches and tools they actually use daily. Not only at work, but also at home. And I use them to the best fit for each context of each project that I'm leading or managing, and making sure that all these tools and approaches add value to my project team that I'm working with, and to the better good of all.

So sorry for a long, very long answer. I know that the management background is, in my mind, not just the methodology or linear waterfall approach of the project management, but it's a rigour. But it has to have other pieces that support and complement it.

KIRSTIN APPELT, HOST: Yeah. You sound like you are the Swiss Army Knife of project management skills. You've got the, like you said, I really like what you're saying about the people skills being such a key part of the project management. When you're managing a project, you're managing people and relationships, and so I love how you, as you really had these realizations, you went out and developed those skill sets.

HUBACKOVA: Yeah. Thank you. I've never heard that, but you know what I like Swiss Army knife. I like that. Thank you. I'll use it in the future.

APPELT: Absolutely. I will be your reference for your Swiss Army knife skill set. Well, thinking about how you brought all that diversity of experience to your capstone project, I know your capstone project was one that may or may or may not have seemed like it from the inside, but from the outside it seemed like a very smooth experience for you all. So how were you able to bring those previous skill sets to bear on the capstone project? Do you think having those skills was an advantage?

HUBACKOVA: Oh, I absolutely think it was an advantage because as soon as we knew what project we are working on, we connected with our team members to get to know each other, to create this cohesive team. And right from the start line, we connected with our project sponsor and the corporations team to also build rapport with them and to create relationships, so we set up multiple meetings so we could be transparent about our plans, our understanding of what the problem is, and providing the progress that we made on the on the project.

So this meeting, like I said, helped us understand business priorities and pressures that our client was facing because we understood this project is not the only project that they are managing and overseeing. And we were able to understand the problem through the discussion and knew what the better perspective was on the project and what they wanted to accomplish, what were their objectives and expectations from us. And because behavioural insights is something new for that corporation, they haven't experienced it before, so we also educated them about the behavioural insight, what it is, and the process that we were going to follow, so they understood what to expect.

And when we were at the stage where we were creating our solution, and trial, we created excitement about it, but we were also very clear about the importance of being prepared as a corporation when the intervention comes, they have to be available for us, their clients needed to be available for us, their subject matter expert, the team, needed to be available for us. And we also set the stage where we were very clear about them being prepared that the intervention result might not be statistically significant. We didn't want them to be hyped, "Yes, they're going to solve all our problems!" We just wanted them to understand that there is a chance that

the trial might not be successful. But, we would have a recommendation for them about what might work, and what they can try next.

That was kind of key, kind of creating the relationship and expectation, but also from the project management perspective, it was important to understand the roles and responsibilities of everybody involved. We needed to kind of agree on governance and approval process. We needed to understand what resources were available for us, and early on, we needed to discuss and get connected with their legal department, because these are not the employees of the corporation we were working with on this capstone project.

So we needed to do those non-disclosure agreements and privacy agreements, all the things that needed to be done for us to be able to reach out to the clients or have access to the data that they previously collected. So we were managing project sponsors, we were managing key partners, but we also needed to have clarity for ourselves, as a team, how we are going from point A to point B. We created a detailed project work plan, that listed all tasks and activities that we expected throughout each and every project phase. And we documented our key milestones and timeline so that we could divide work among ourselves by assigning both task to each team member, so that we had clarity from the very beginning, who is responsible for what, and when it needed to be done.

Lots of people are very visual and I like pictures, so we created a high-level Gantt chart, for the critical project path, so that we had a visual representation of, these are high level milestones, and these are the timelines that we have to reach. We had some wiggle room because we know, because we plan something doesn't always go your way. But we were striving to deliver as per timelines because we knew, like the Certificate, the program, needed to finish by June. We didn't have a lot of wiggle room to say, "Oh yeah, we will go and ask for approval for extension of the timeline!" No, that luxury was not there for us.

So yeah. That was lots of approaches from the project management that helped us to be successful. And the biggest one was we communicated often, but in a very clear and concise way because people can overwhelm everybody. So communicate, communicate, communicate.

APPELT: Absolutely, and I have to say to everyone listening that Dana's charts were so beautiful that they were the inspiration for some of the materials that this year's students have gotten to benefit from. Because I was like, "Oh, that's a great way to capture everything", because there are so many moving parts, and I found what you had was just a really great overview document, and so, that has been a huge value-add to everyone. So thank you for inspiring me.

HUBACKOVA: Thank you, and I'm glad that other people can use this and hopefully it will help them be more organized then and, yeah, and be successful.

APPELT: Yeah, so are there any major similarities or differences between what you see in managing BI projects versus other projects?

HUBACKOVA: There are not huge, huge differences. The BI project because it was our first, was much smaller, not complex, not as huge team. Not too many dependencies. The governance structure was so much simpler than I'm used to, which was a really, really nice change, and we didn't require a multi-level approval process. And yeah, so lots of similarities.

APPELT: And kind of pulling on that thread a little more, I'm curious about how you see your BI and project management skillsets working together, and maybe we can break that into two separate questions. First, do you think your project management skillset enriches your BI practice, and if so, how?

HUBACKOVA: Oh, both of them are very complementary they are intertwined and they support each other, and my existing project management skill set helps me stay focused and organized, but mostly keeps me at bay before jumping into solutioning. Because I get so excited about, Yeah, I can design and you know, I can trial different solutions, but it kind of brings me back like, no, you need to follow the process to be successful. So stay focused, stay organized, keep you know, keep your head down, don't get too excited. That phase will come. And so that's the rigour, project management brings rigour to my behavioural insights practice.

APPELT: I like the idea of it being the thing that helps keep you back because we do really all get that sense of "Oh, this problem's so fantastic and I know just the solution", and then you think like "Oh, wait, we haven't even actually asked all the questions to make sure we understand the problem. We're not ready to solution yet".

HUBACKOVA: Yeah, exactly. That's human nature.

APPELT: Yeah. Well, kind of on the other side of that equation, do you think now that you have burnished your BI knowledge and skills, has it changed the approach you would take to future projects for project management?

HUBACKOVA: Oh, absolutely. Absolutely. The knowledge that I have now about behavioural insights, it just helps me bring the behavioural sciences, the psychology, economics, and neuroscience to the forefront of every project that I'm working, because there is that people piece, you know, the understanding of how and why people behave the way they do in the real world is often forgotten. Like we forget about people. We work on projects to make it easier for people, but we do tend to forget about the people. And that EAST framework, I absolutely love it. So I bring awareness of EAST framework into the conversations that I have with project teams. And that I believe will help when we are creating new policies, or designing new policies and programs that they're easy, attractive, social, and timely. I totally believe in it and I'm so excited about it.

And I am actively promoting behavioural insights wherever I go, and how I can, and I do information sessions, introductions to BI, yeah, unofficial, informal but just creating that excitement in people and seeing "aha" moments and seeing smiles on people's faces, when I create reminders, I use some nudges and sending notices in a timely way and creating them in an attractive way and making sure teams can find information with ease and using personalization, providing feedback, all this is just part of BI. A few things I was already doing, but now I'm more aware of how I can bring it to the next level.

APPELT: Absolutely. And I think something that came to me while you were talking a bit is just the idea that with BI a lot of times, it's things where if we're not thinking about the BI toolkit, we're designing things as if the people who are using them are us right now. And, you know, we're so heads down on a project that we know every nook and cranny and BI kind of helps us step back and say, okay, if we weren't so totally heads down on this project and we are seeing this with fresh eyes, you know, it gives you those questions to prompt yourself. Is it actually easy? Is it actually attractive? Is it actually social? Is it actually timely?

I think those are really good tips. And one thing I'd like to echo is just the idea that sometimes people, I think, shy away from some of the planning and the relationship building kind of maybe in their eagerness to jump in. But I have to say, from everything I've seen in my advisor role, is the teams that are not only the most successful, but the teams who enjoy it along the way and feel like they have a positive sense of accomplishment, are those teams who spend the time, even if they feel like, you know, they're not getting started as quickly, but really they're going to be ahead in the end because they've spent the time to do the planning and the relationship building. The teams who do the check-ins, even if it feels silly, checking in before

you get down to business. But you spend time just seeing how people's day was or, you know, what's coming up in the schedule for them. Or one of the teams used to do just kind of a silly question. Like one time it was like, "Do you believe in ghosts?". Another time it was like, "What's your go-to comfort movie?". But the teams that that do that relationship building I find are just so much more successful and happy along the way. I totally agree with that recommendation.

HUBACKOVA: Absolutely, absolutely. And our team, like I was really, really lucky to be part of our amazing team. It's a small but mighty team of three, and we started our relationship and meetings with icebreakers and just have fun, laugh, and get that pressure off our shoulders, because we didn't know each other like we were.

We had a member from East Coast, two of us from British Columbia. We never met before. We didn't know each other. We didn't know what strength and skills each of us have. So, to create a relationship, you need to get to know people on a personal level. And when you feel comfortable and safe, that's where the magic happens because people are not afraid to ask questions or come up with amazing and sometimes silly ideas, that we feel are silly, but those are the best, best solutions, best ideas that help us move forward and succeed.

APPELT: Yeah, absolutely. That sense of safety and that you're in good hands with each other, I think is really important for being able to explore the problem space and the solution space. It really pays dividends throughout the project. Well, thinking about the program more broadly, are there any highlights you'd like to mention, things that you particularly enjoyed or that have stuck with you?

HUBACKOVA: The things that stuck out for me was amazing collaboration and support from not only my team members, but also our professors and the classmates. It's been a nine-month journey that felt when we were going through it, like a big, big task, but it went by so fast because we had so much fun and so much support, and the topic was so interesting that it's been an amazing journey. And when I look back, and we still keep connected with my team members, and we were asking, "Okay, now that we finished the certificate, would we do it all over again?" And all of us unanimously said, "Yes, we would do it all over again". Even knowing that there were some challenging times, there was a time crunch, there were other personal things that we needed to look after. We have families. We have our regular work, but the highlights were just the people piece.

APPELT: Yeah. That theme of relationship coming through again and how important that is for projects. Well, we are running close to out of time. So, one of my traditional last questions is "Do you have a message for our new BI practitioners in training?".

HUBACKOVA: My message is to enjoy your journey, make new friendships and connections along the way, and remember to have fun.

APPELT: I think that is a perfect message. And were there any last thoughts you wanted to share, or any questions I should have asked and didn't?

HUBACKOVA: No, I think you've done a good job, and I am really, really pleased and grateful that you reached out to me and asked if I can share my knowledge and experience. So, if anybody has a question, feel free to reach out to me, and I would be more than happy to chat with you. Thank you.

APPELT: Oh, well, thank you so much, Dana. It's been such a treat to talk today and hear a little bit more about your perspective on project management and all the work you do and how you're integrating BI into

everything. I'm so excited to see how you continue to weave everything together in your massive and ever-growing Swiss Army Knife set of tools. Well, thank you for joining us today, Dana.

HUBACKOVA Thank you for having me.

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