Calling DIBS

Episode 5: "Advice for Learning How to RIDE"

with Isabelle Andresen, Behavioural Insights Consultant

Having worked with organizations like the Behavioural Insights Team (BIT) and the BC Behavioural Insights Group (BC BIG), Isabelle Andresen has a very impressive resume and well-honed BI skills. In our conversation we talk about project scoping, exploratory research, and obstacles and strategies for BI projects. It's highly relevant to our Project Scoping and Exploratory Research courses so I strongly recommend giving it a listen!

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 Isabelle Andresen, a Behavioral Insights Consultant. We're extremely fortunate to have Izzy on the podcast because she has such diverse experiences as a BI consultant. She's worked with the UK government as well as the Behavioral Insights Team. She's also worked with the B.C. Behavioral Insights Group, the City of Vancouver and WorkSafeBC to name a few of her British Columbian clients. So, that's a pretty hard BI pedigree to top. And for me personally, I always come away from a chat with Izzy with new ideas and a calm, collected feeling about even some tricky projects, and that's an "in demand" feeling in 2020. So, I'm excited to talk to Izzy today. So, Izzy, welcome to the podcast.

ISABELLE ANDRESEN, GUEST: Thanks, Kirstin. What a lovely introduction.

APPELT: So, can you start by telling us a little bit about yourself and your BI role?

ANDRESEN: Yeah, of course. And as you mentioned I'm a Behavioral Insights Consultant, and I'm actually based in the UK and I previously lived in Vancouver but moved back over to the UK a couple of years ago. And I work as a Senior Policy Advisor with the Behavioural Insights Group, which I'm sure you're all aware of now. They're based within the B.C. government. And I also have kind of various other bits of work going on the WorkSafeBC, City of Vancouver, et cetera.

But prior to my consultancy work, I worked for the UK's Behavioral Insights team who developed the EAST Framework and MINDSPACE and have done lots of work in this area. So, a lot of my work for the team there was running RCTs to test the impact of different policy interventions, mainly relating to local government.

APPELT: And what led you to a career using behavioural insights?

ANDRESEN: Good question. So, I started off, after studying psychology, I went into the UK civil service and I remember being at a training session there, and I came across Sam Hanes who worked for the Behavioural Insights Team, and he was presenting on a study on loft insulation and how to kind of encourage people to insulate their lofts or attics. And I thought, wow, that's so cool. It kind of combines psychology, which I love, and understanding human behaviour with research methods, its really evidence based, and it's so kind of real world, you can really have an impact. And I think that's kind of that sort of combination of all those passions, and also, you know, having had experience in government and really sort of enjoying having an impact through your government process made me kind of think this is an area that I'd love to work in.

APPELT: That's a perfect illustration of the different components of behavioural insights, so I love how you brought all three of those together. So, kind of relatedly, do you have a favourite behavioural insight or favourite behavioural insights case study?

ANDRESEN: Yeah, I think my favourite one was a project done by the Behavioural Insights Team and Public Health England in the UK. And this was a few years ago now, but the aim of the project was to reduce unnecessary prescriptions of antibiotics, which is obviously a really important topic because we are becoming resistant to antibiotics. And what they did, was they just sent a simple letter to GPs who were high prescribers of antibiotics. And in that letter, they just provided some very simple feedback to tell the GPs that the majority of GPs in their local area prescribed fewer antibiotics per head than they did. So just a very simple peer comparison and also some tips of how they could potentially reduce their prescribing.

And it was really successful in reducing unnecessary prescriptions. And I guess one of the reasons that I like that example so much is because it's a simple and very cheap intervention for a very complex problem, which often costs kind of governments a huge amount of money, kind of thinking about how to tackle it. There's lots of routes that you could go down, whether it be influencing the behaviour of vets, or clinicians or the public. And this was just really kind of breaking a complex problem down into something very simple and cheap, which had a very powerful impact.

APPELT: That's a great example of how just small changes can have huge impacts, and I think that's one of the magical things about behavioural insights. So, thinking a bit about the way we do behavioural insights, we've talked about the RIDE model and how that's a way to trace the steps of a BI project. So, I'm curious because you and I have both done a number of projects using the RIDE model. In your experience, which step has the steepest learning curve? Which one's the hardest to master?

ANDRESEN: So, I think for me, the hardest one to master is probably innovate, because in innovate you are designing an intervention, but if you're running an RCT, you're designing a trial. And if you've not had experience of working on a trial before, there is quite a lot to learn. And so, I think in those first few trials that I ran, there was a lot to get my head around in terms of kind of questions I should be asking, things I should be looking out for, how to conduct randomization, thinking about what the outcome measures were, how you can kind of connect your-- make sure that you sort of can connect your intervention to outcome measures.

There's just a lot to think about. I think that's a real learning curve. But equally, it often comes by doing, so you really need to run a few trials, get them under your belt, and then it becomes kind of second nature and quite intuitive as to things to look out for.

APPELT: Absolutely. And I think that speaks to part of how we designed our certificate program so that they are getting that experience with the capstone project because like you said, learning by doing is really the best way to learn how to do research design.

ANDRESEN: Fantastic. I'm sure that'll be so valuable for everyone in the certificate program.

APPELT: And thinking about the RIDE model, which steps do you find vary the most between projects? Like which steps, each time you do a new project, you know, it's going to be a little bit different.

ANDRESEN: I think, I mean, all of the steps tend to vary quite a lot between different projects. But I guess the research phase, that can be a huge amount of variation. And so, for some projects, it can be extremely time intensive if you're conducting lots of interviews or doing lots of observations or site visits and literature reviews. And that can take a lot of time and sort of, you know, some specialized skills in order to do that work.

But then, sometimes in other projects, it can either not be possible to conduct intensive research because of maybe the population, or the context that you're working within, or if it's kind of a very simple project, sometimes you've got really good kind of evidence within the literature to draw on, so you don't need to do as much of the time intensive research. But yeah, I'd say it's a kind of extremely valuable stage of the RIDE model and something that kind of can get overlooked in some areas of government work. And it's something that I know we all value a huge amount, but it can lead to a lot of variation with projects, I'd say.

APPELT: Yeah, I can think of a few projects where we've had really intensive interviews sessions, so I definitely agree that that's one where sometimes you do it in a couple of weeks and sometimes it takes six months or even longer. So, what do you think are some common pitfalls? I know you and I have been on some projects that have been huge successes and some that have kind of petered out unexpectedly. So, what do you think are some of the things that make a project-- that derail a project?

ANDRESEN: I think for me, one thing, that often derails a project, is not having the necessary buy-in from the client or whoever you're kind of running the Behavioural Insights project for. And often, that can be kind of initial interest or enthusiasm, and then, kind of either as you sort of seek more senior approval, or as time goes on, that can sometimes wane a little bit.

And I think without that client buy-in, it can be quite a struggle to kind of push the project forward because ultimately, it's a really collaborative process and you really need them to kind of often, provide the data, provide the kind of platform for introducing the intervention. They play such a crucial role. As well, signing off a project and allowing it to move forward. Yeah, that's definitely been a stumbling block in the past.

Another pitfall, I'd say, is data sometimes, that it can be either difficult to collect data, so maybe there's not an existing data source and that obviously can be problematic. Or if that is an existing data source, which is normally kind of a project that we want to go for, it can be difficult to access it and kind of transfer it, and making sure that you're not obtaining any personal, identifiable data. So, I think yeah data can definitely be a barrier along the way.

APPELT: I totally agree both about the necessity of having good stakeholder buy-in and the importance of data, and I think that really speaks to the importance of the project's scoping and problem discovery phase-- when you start to find those, or hopefully you have the right conversations to find out those kinds of pitfalls before you get too far. So, any thoughts about the project's scoping phase and how that works well, what makes it be a success?

ANDRESEN: Yes, so the scoping phase, that's when you're really trying to work out whether a project is kind of worth undertaking. And I think what works well, is firstly setting up a meeting with the client or whoever you're working with and really try to understand the problem that they're grappling with. And sometimes it's quite a broad issue that they haven't necessarily kind of pinned down to specific behaviour, and sometimes they already know kind of exactly what the issue is, what the behaviour is and where they want to intervene. And I think, if they've done more thinking around that, that can be really helpful because then you can easily make an assessment as to whether the behaviour and the idea that they're kind of coming up with is amenable to behavioural insights approaches.

And it's also in the scoping phase, I think one thing that's really important is speaking to people who are involved in data, the data side of things. Because as I mentioned, that can be a pitfall and a stumbling block sometimes. So, if you can have these conversations really early, and find out what data is available, and whether you'll be up to kind of access it, and whether it does actually kind of track the behaviour that you wanted to, then that can kind of really help you to make an assessment as to whether the project is worth pursuing and going on to the research phase.

APPELT: Absolutely. And I think that points to something that I've been thinking about, which is sometimes when we're in the scoping phase and we don't know a client well, we're hesitant to ask some questions because we think they're stupid questions.

But then often those are the really important questions. Where like, you know, you might feel like it would be stupid to say “Well do you record this data?” because, well, of course, it should be recorded. But then sometimes you find out later on that it's recorded, but it's recorded in a separate database that doesn't talk to the other database. It's really important to actually ask those questions, even if they feel like obvious questions.

ANDRESEN: Yeah, I would totally agree with that. Some of the simplest questions are the most important. And as you go kind of through working on trials and you sort of realize which ones, the things that are so easy to miss but are just so crucial, like you said, whether those data are available, as well as just kind of assessing intuitively how interested the client is to pursue the project and the effort that they're prepared to put in.

APPELT: Absolutely. I can think of a few projects where, you know, I think maybe we didn't realize that we were so much more keen than the client. And so sometimes your own enthusiasm kind of overshadows the fact that maybe the client isn't in the same place as you.

ANDRESEN: Yes, we've definitely learned the hard way.

APPELT: So, moving on to the next phase, and the phase that you mentioned being so variable, user research, we've talked about and we've experienced together some projects that have had intensive user research and then others that have relied more on secondary research. So, could you talk a bit about how you make those decisions on when you're going to do user research, and when you think secondary research will be sufficient?

ANDRESEN: Yeah. So, I mean, secondary research is obviously so valuable. And I think that normally comes in tandem with user research. Or if you're not doing user research, then it's normally kind of necessary to do that either way. I think it often, it depends on what the problem is and how complex it is and what populations you're working with, I mean, if it's kind of a sort of very routine process or service that you already know a huge amount about, or there's been lots of prior research on or maybe kind of behavioural insights, approaches already applied, and you can draw on that kind of existing body of evidence, then it can not always be necessary to do a huge amount of user research.

But I do think, you know, the majority of projects it is really important to do it. And often, it is when you're working in an area which you yourself might not be wholly familiar with. But also, when there hasn't been-- you don't know the kind of reasons people are behaving in the way that they are. And user research really helps to kind of understand people's feelings and perceptions. What are the behavioural barriers, what the motivators are, really get to those kinds of points which will help you to create a really good, well-informed intervention, because I think, you know, it's easy to kind of jump the gun and sort of just look at a trial that's been done before and say “Oh, we could kind of replicate that”.

But actually, you know, if you don't know the context, you don't know whether it's appropriate to do that, you don't know what kind of the subpopulations are, what issues they're grappling with, what their experience of the service is, because often a service can be designed in kind of a very logical way, but in practice, things happen totally differently. Or, you know, you don't get to kind of observe or find out about the interaction between the service user and the staff, which is so critical in the design of the intervention. But I think a lot of it depends on the complexity of the behaviour and the populations and yeah, what you're actually focusing on in the project.

APPELT: Yeah, I think you really captured well that secondary research can set the background for you. It can really catch you up to speed on what's been done elsewhere. The limitation is it's rarely specific to your project, your specific context. And so, what user research can help with is coloring in what is happening with this specific population in this specific context as opposed to in other places this has been looked at.

ANDRESEN: Yeah, I think that's really nicely put.

APPELT: And so, if we were to say the same thing about user research, what do you think are the limitations of user research?

ANDRESEN: Well, user research is quite time intensive. I mean, it depends what resources you've got available to you, but I think that's kind of a one limitation that people come across a lot. And I think, I guess in terms of like, actually doing user research, it's easy to fall into pitfalls, whether that be using leading questions or complicated questions.

And, sort of, really sort of prepping and planning for user research, I think is really important and being very clear about what your aim is, what you really want to get out of the research in advance of conducting it, is crucial so that it's as productive as possible. And I think one thing that can be challenging with user research is getting access to the individuals that you really want to speak to, you know? In government, sometimes that can be hard. But, you know, it's kind of worth persevering and trying to speak to as many of a range of individuals working or accessing a service or process.

APPELT: I really like what you brought up about talking about the importance of reaching different individuals. And though it can be tricky, it's worthwhile. It reminds me of a project we worked on, where the topic was sensitive. And so, we wanted to be able to talk to people in a way that was anonymous. And so that made it really tricky to recruit these people, but we figured out a way to do it, and then I think we got such valuable data about how that process worked. So, there are innovative ways to do interviews where you can reach more people and reach them anonymously.

ANDRESEN: Yeah, I would totally agree. And one thing that occurred to me, as you were saying that, is that it's important to make people feel relaxed. And if you're coming from central government and you're going to more of a local service, I think kind of building that rapport with people, maybe making people feel relaxed and not like you're there to kind of look over their shoulder and make sure they're doing their job okay is really important.

APPELT: Absolutely. It takes practice to be able to set the stage for an interview well, I find. So, thinking about these interviews, and how if you do them correctly, they actually produce a mountain of data. And if you're doing that again and again over different individuals, you get a whole mountain range of data. So how do you approach processing interview data?

ANDRESEN: Well, interesting you ask that because more recently as things have kind of been moving online, I've taken a slightly different approach. So, for a recent round of interviews, we used Miro, which is an online platform, and we kind of, a lot of it is about identifying themes within the interviews. Obviously, you have lots of notes, and sometimes audio recordings, but really about thinking about what is it that you want to find out, which is often where the behavioral barriers -- kind of what's causing frictions or issues for people, and then what's working well. What are people's motivations for doing something? And also, I think it can be really useful to kind of capture ideas that they've got, the people that you're interviewing, ideas that they've got for interventions or kind of improvements, or what would kind of an ideal situation look like for them.

And so often, we kind of identify their insights along those sorts of themes. And I've done it before in various different ways, whether it's using post-it notes all around the room and just kind of looking through my notes and the colour-coding -- different things and insights, or building off kind of a complicated Excel file.

And more recently, yeah, using Miro, which I found really helpful, to be able to kind of work together with other colleagues and say that we could all input our insights at the same time. And then kind of once you've created a big board of insights, trying to sort of remove the ones which are overlapping, pulling out key themes that you've identified, and sort of identifying the sort of priority insights that will help to inform your intervention design.

APPELT: Absolutely. And one thing that kind of came to me, as you're talking about that and how we often do probe motivations and barriers, but then at the same time as behavioral scientists, we know that sometimes we're not accurate at reporting our own motivations and barriers. So, this may be a tricky question, but how do you reconcile those two ideas and how do you tackle that in the work?

ANDRESEN: So, I think it's really important to use user research alongside other kind of insights, whether that's looking at the kind of hard data, using the behavioral science literature to see what's been done before and actually think about -- we know humans are very unpredictable in their behaviour and we're subject to various biases.

You know what people are telling us. Can we then apply a behavioral insights lens and really think about what are the biases at play? Maybe what people are kind of saying they're motivated by. Are there other things that we've missed? And I think it's really important to kind of combine your behavioural insights expertise and other kind of insights, whether it be from the client that you're working with and their experience of a process or a service and the existing literature with the user research to kind of give a holistic view of it all. And that can really help you to come up with a valuable intervention.

APPELT: Yeah, I love that you described it as a holistic view. I think that makes a lot of sense. So, if you only do user research or you only look at the BI background of research, you're only getting one side of the coin. But by doing both of those things, you're getting hopefully the full picture.

ANDRESEN: Yeah, absolutely.

APPELT: So, having thought about some of these things, we've talked about the ways to be successful, the common pitfalls, do you have any messages or advice for our BI practitioners in training?

ANDRESEN: I just say that for me, it's been such an interesting, but also fun area of work. So, it's kind of "Go out and enjoy it". And don't be too intimidated by all the literature that's out there, and all the methods and the terminology and the kind of, yeah, the skills that you've got to develop-- because it does come kind of naturally and with practice and that you can read all the books that are available, but actually, what I found most helpful is kind of having a sort of platform of knowledge, but then really building that with applied and practical experience.

Overall, I like to say it's a fascinating field to get kind of interested in. And there's so many opportunities to apply it. You suddenly realize that, you know, everything is about behaviour. All government policy, the majority of it, is about behaviour and how we can kind of change it and help people. So, use it wherever you can, even if your jobs not specifically related to behavioural insights.

APPELT: I think those are really great points and echo a lot of what I feel too about how it's really a fun line of work to get to play around with these misperceptions and things that we can tweak and make better and make a difference in people's lives.

And also, like you said, how it is really through practice, like this stuff only makes so much sense on paper, it's when you actually get working with it that it all kind of comes together. So, any last thoughts, or questions I should have asked and didn't?

ANDRESEN: No, I think you covered it all great. Yeah, that was really enjoyable to be on the podcast and I'm so glad that everyone's kind of enjoying the Behavioural Insights certificate. And just thank you for having me here.

APPELT: Well, thank you. It's been delightful to talk with you as always. And I hope everyone listening has an even greater appreciation for the skill and how enjoyable BI is and how it all comes together to pull a project from start to finish. So, thanks to Izzy and thanks for listening to Calling DIBS.
