



Episode 60: "Frameworks Make It Easy"

with Whitney Queisser, Lifecycle Marketer

For Whitney Queisser, UBC's Advanced Professional Certificate in Behavioural Insights introduced her to frameworks that have changed how she tackles A/B testing as a lifecycle marketer. Whitney discusses how she uses the RIDE process model to structure her projects, the EAST and MINDSPACE frameworks to brainstorm behaviour change solutions, and ethics frameworks to guide her decision-making and ensure she's nudging for good.

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 & Society or DIBS for short. Today we're calling DIBS on Whitney Queisser.

Whitney is a Lifecycle Marketer. Whitney is also a recent graduate of the Advanced Professional Certificate in Behavioural Insights. In general, Whitney is a delight to chat with and someone who's super enthusiastic about the world of behavioural science. So, I couldn't be more excited to have the opportunity to talk with her today. So welcome to the podcast, Whitney.

WHITNEY QUEISSER, GUEST: Thanks for having me. I'm really excited to be here.

APPELT: Well, I'd love to start out by hearing a little bit about you.

QUEISSER: So I'm actually U.S. based down in the States. I grew up in the Bay Area and now I work remotely from the beautiful Pacific Northwest over in Bellingham, Washington. I've mainly worked for tech companies my whole professional career, but I had a career change about five or six years ago from manufacturing operations to marketing operations and then user engagement marketing and ultimately lifecycle marketing, which I really love. I have a seven-month-old daughter and I'm having a lot of fun getting back into the swing of things at work after being off for a few months for parental leave.

APPELT: Awesome. And of course, congratulations on all those various accomplishments, including getting back into the swing of things after welcoming your daughter. So, one of the podcast questions, we often start with something you've already alluded to a little bit, which is that all of us tend to have winding paths to BI.

You alluded to the fact that you had some twists and turns along the way to being in a more Marketing Behavioural Science role. So what brought you to BI? What was that journey like for you?

QUEISSER: About a year into my marketing career, I read "Nudge" and I started to think about how I might be able to apply behavioural insights to my projects that I was working on. And then in the last few years, I've run literally hundreds of A/B tests trying to drive different consumer behavior, whether that's engagement with different messaging or driving in-app actions or revenue or retention. I took a stats class in college and I hated

it, so I never imagined that I would be so excited to calculate statistical significance and roll out or pull back on tests. But because I was running all of those tests and trying to drive different metrics for the companies I worked for, I became really interested in influencing behaviour and how to influence decision-making in an ethical way.

APPELT: It's so interesting how I think for many of us we have that feeling of like, "Oh, stats is this dry, boring thing." But then when it's your data, it's so interesting and it comes alive. I love that you had that experience as well.

QUEISSER: Yeah, it's one of my favourite things to do after an experiment.

APPELT: Well, so that explains your journey to BI. What led you specifically to the Advanced Professional Certificate?

QUEISSER: Well, I'd been toying with the idea of going back to school for a while. I was really on the fence about investing the time and the money and like what the degree should be in. You know, I did not have an undergraduate background in marketing or psychology or a lot of the common degrees that people with marketing or people who are studying consumer behaviour have.

And then I happened to be chatting with a friend who mentioned she'd been working on developing this new certificate program at UBC. I was so impressed that she had just started a new program. Basically, I went to the website to check out the details, so I had more context to congratulate her on a job well done. And that was you, by the way.

And when I was looking at the details of the program, I was like, "Oh, my gosh, this curriculum looks really interesting." Like the program looked really robust, but it was also part time and probably most importantly, remote. I was like, "Oh, this is something I would get a lot out of and this is something I could actually do without needing to uproot my life or pause my job or anything like that." I signed up for the introductory course and I was totally hooked.

APPELT: That's awesome. I think you were the only person who when I've been boring them with what I'm up to at work has actually been like, "Oh, that's cool, I'm going to actually look into it." And then it was so awesome having you in the program. So, win-win.

One of the things I was hoping we could talk about was the intersection of BI and marketing because I thought it was so interesting when I look at your LinkedIn talking about how we're creeping at what each other do at work, and I saw that your field is lifecycle marketing and I thought that was such an interesting term. So, can you explain for us what that means and how that's different from other marketing pursuits?

QUEISSER: Great question. A lot of people don't know what lifecycle marketing is. I found that people tend to think of marketing as, you know, maybe event marketing or advertising, or social media. Lifecycle marketing is basically all about someone's journey, after they make their first purchase with a brand or download an app.

It can look different whether it's like e-commerce or app-based, but it's basically personalized messaging for a segmented audience based on where they are in the customer funnel. Like if they're a new user, an active user, if they're lapsed, or like a loyal returning customer. Say you download an app to help you track your newborn feedings, diapers and sleep.

APPELT: Nice random example.

QUEISSER: Just a random, totally random example. But you have a newborn so you get interrupted in trying to set it up. You might get an email or a push notification from that app, prompting you to like finish setting up your goals or maybe you buy some fancy diapers that were marketed to you on the internet.

And a few days after delivery, you get an email asking you how you liked them. And now that you're thinking of how amazing they are compared to the store brands, you get prompted to, you know, why not sign up for a subscription to save some precious time and money?

Also, just another total random example. Or maybe you haven't opened your language learning app for a while because, you know, you have a newborn baby and you get a either a push notification or an email reminding you that your next lesson is waiting for you when you're ready.

Those are all examples of lifecycle marketing touchpoints in practice to communicate to people at different points in their journey. So, it's really all about delivering this relevant, engaging content across different channels to ultimately drive engagement and retention and maximize the lifetime value of the customer. If I had to boil it down, lifecycle marketing is all about sending the right message, at the right time, to the right person.

APPELT: Wow. That's a nice, concise summary and I love how Eva is already helping you along your BI journey with helpful nudges and prompts and getting you signed up for the best, only the best in diaper technology.

QUEISSER: Only the best for her and us.

APPELT: So, I'm curious and for this next question, we can talk about marketing more generally or lifecycle marketing more specifically, but how do you see BI and marketing or lifecycle marketing intersecting? What are similarities, differences, points of commonality, etc.?

QUEISSER: Yeah, there are quite a few ways that they're similar or intersect. So, both marketing and BI involve the study of consumer behaviour and then use psychology as an input to understand motivation or why people make choices. Sometimes marketing can be about getting people to perceive a brand or a product in a certain way. And that's just similar from behavioural insights because BI isn't meant to influence perception or opinions, just actions.

My area of marketing is around attempting to move people through this customer funnel, and that's where BI can feel similar, getting people to take a desired action, or maybe even closing the intention-action gap. Kind of like with that, my example of downloading an app but then forgetting to finish setting it up.

APPELT: So, it's interesting to think about areas of commonality and distinction. I'm curious to see if there are ways you think your increasing BI knowledge and skills have changed how you approach marketing?

QUEISSER: BI has certainly given me a much deeper understanding of the psychology behind behaviour change in decision-making. It also has led me to be much more on the lookout for dark nudges and sludge because in BI we want to help people take actions that are promoting their health, wealth, and happiness. I'm always on the lookout for dark nudges and sludge. They can really creep up on you and I think it's important to, as a marketer, to be really aware of those, you know, dark nudges and sludge occurring, and where possible, try to keep them from entering production.

Also, my BI knowledge has helped me in being more mindful in designing campaigns or experiments that are really attuned to the needs and desires of my audience and focussed on removing barriers or friction to processes to more easily let people take the action that they want to take.

APPELT: Yeah, I love that. I think one of the things for me that is helpful is you don't necessarily have a framework of ethical constructs that you want to weigh your solutions against until you actually stop and think about that. And I think that something through doing coursework or other types of training, it gives you that opportunity to develop your list of questions of what are the considerations you want to make sure you've thought of before you kind of release a BI solution out into the world. And so going through that thought exercise each time and having your set of questions I think can really make sure that you're using BI in ways you're comfortable with.

QUEISSER: Definitely.

APPELT: So, looking at that question from the flip side, not how BI has changed how you approach marketing, how, on the flip side, how do you think marketing enriched how you use or understand BI.

QUEISSER: I think my background in marketing gave me a pretty solid, what we call a "user first" perspective, which was helpful when thinking about different groups of people and actions that we might want them to take for BI and what might be holding them back.

The idea of friction, for example, was really familiar to me. I also had quite a bit of experience designing experiments and creating different programs based on customers needs or behaviours. So, when we were learning, kind of getting in more into the weeds of BI and how to execute on some of the research and testing and evaluation, I felt like I had a little bit of a leg up.

APPELT: Absolutely. I remember how vital a resource you were for teams. Some of the teams were working on projects that involved email communications. And you just have, right off the top of your head, common statistics or things they should do, and should not do. And so that's one of the things I love about the program is people's expertise are so complementary. So, you were able to really step up at that point and offer so much wisdom.

And it strikes me that another piece kind of pulling on what you were saying earlier in life cycle marketing about how it's the right message, to the right people, at the right time. I think that's another way that you came into the program really strong, is you were already really familiar with the idea of segmentation and that it's not necessarily the same BI solution for everyone. Different people will benefit from different BI solutions. Does that make sense to you? Did you feel like that was an area that made sense to you?

QUEISSER: Yeah, absolutely.

APPELT: And thinking a little bit more about the Certificate Program, since we've already kind of gone down that road. Were there any experiences that really stayed with you now that you're approaching the year mark out? Not quite there yet, but it's almost a year now. So anything that's really stuck out and stayed with you?

QUEISSER: Yes. So, I really enjoyed the coursework throughout the program, but I think the Capstone experience was particularly exciting. My Capstone group, we tried to increase paid parking compliance in Downtown Vancouver and we designed some new parking signs as our intervention.

And it was so cool to put everything together that we had learned in the course in a real-world, applicable environment. It wasn't smooth sailing by any means. But seeing our intervention in the wild, in Downtown Vancouver was really awesome. Our research had a null result, but actually that was really helpful in helping me learn to embrace experiment failures.

You might think, "Oh, it looks really bad. You have a failed intervention for your capstone.", or like at work, if you have a bunch of experiments running and say most of them are, you know, quote-unquote "failures". But those null results are really important in driving us forward. They keep us from repeating the same errors and help shape the direction of future studies. So now the next group of intrepid explorers can learn from our research about paid parking and might get closer to an answer.

APPELT: Absolutely. I love that that's one of the takeaways because I think that's something that is so true, but it's really hard to wrap your head around. There is just this feeling of null results, meaning that it didn't work. But in reality, like you said, they're just as useful. We don't completely understand human behaviour. Human behaviour is super complex and it differs by group or by application. And so, learning what doesn't work helps us just as much as learning what does work, which it sounds great, but it really is true.

QUEISSER: We should push for more people to publish their null results. Please. I mean, I guess it wouldn't make for as exciting reading, but they're very important.

APPELT: Yeah. Yeah. Imagine if like case studies or articles had a list of "And here's what else we tried that didn't work.". That would be so helpful. And it would save, like you said, so much time and resources because other folks aren't then trying ideas that have been tested and failed.

QUEISSER: Exactly. I would love that.

APPELT: Well, beyond program experiences, are there any specific ideas or skills that you find yourself using, whether that's on the job or in life or with baby care, anything that you're actioning?

QUEISSER: Yes. I mean, all the time, especially when it comes to infant care. Like I default to, you know, make it easy from the EAST framework like all the time. That's basically my-- that's my internal drumbeat and voice, make it as easy as possible. But I actually do refer to the EAST Framework pretty frequently. I'll share the pdf link with the executive summary specifically with colleagues, fairly often when we're brainstorming different ways to run some tests or things to try.

But another thing that I use actually really frequently with work is the RIDE method. So that's focusing the research phase, for example, what's creating friction for users to do a required action and the next stage would be innovation. So, I again, I look to the EAST and MINDSPACE Frameworks for inspiration a lot when I'm thinking of how to tackle these problems, the D is data collection. So, we A/B test the different experiences and then E, in RIDE is evaluation. So we look for statistical significance in our results, whether that's email engagement, or purchases or retention. And then we, we iterate if we get a null result or a result that we aren't very confident about, or we scale it if it works and make it the default experience. Using that RIDE framework has brought a lot more structure to the way that I run experiments and it's super helpful.

APPELT: So great to hear about the ways that you're able to integrate things into your work and your life. Well, looking ahead, where are you going from here? How do you hope to continue to use BI in your career as you move forward?

QUEISSER: I feel like I'm really lucky in that I can use BI today, in my job, and I mean looking forward, I would love to focus more and more on BI. So, I know that there are more nudge agencies and then organizations within companies that are being created. I think that's really interesting.

I'd like to bridge the gap between user research and marketing on the consumer side to help create these really super personal targeted programs that, yes, help improve the bottom line for the company, but more importantly, are improving the consumers health, wealth and happiness.

APPELT: Oh, I love that idea. That I think would be a really interesting development. And so, maybe you've already answered this question, but what are you most excited about for BI? Is it whether it's ideas or research or events or anything, is there anything that's tickling your BI interest right now?

QUEISSER: Yeah, actually. There's a whole lot of excitement and buzz right now, not necessarily with BI just like in the world about ChatGPT and AI in general. And I'm really interested to see how BI might benefit more from AI and machine learning in the future.

Like as a marketer, machine learning can be super helpful in, I used to use a tool that would predict and forecast things like a next order date, or like churn risk, or what's the optimal time to send a message that the person will actually engage with, and personalized product recommendations. And that's opened up a lot of opportunities for A/B testing, but also just for optimizing our messaging.

I'm really interested in how I mean, I don't know the answer, but I'm interested to see in the future, how some of that machine learning or like generative AI could be applied to BI research, either to help make research easier, or simpler, or be part of an intervention.

APPELT: Yeah, that seems like that is definitely a topic for a future episode or two or three. That is a very interesting area about the AI and BI intersection. I think like you said, that's going to be something that's very topical for the next few years and that could go lots of different, there's lots of different areas for intersection where they could work together in exciting ways.

QUEISSER: It opens up a whole new can of worms when the ethics of AI and BI intersect.

APPELT: Yeah, yeah. And you can think of ways that maybe BI could help with the ethics of AI, but then there's also ways where it could go south. So yeah, there's definitely a lot there to discover. Well, moving on, we often end the podcast with a couple of questions. One is, do you have a message for our new BI practitioners in training, the cohorts following you?

QUEISSER: Yeah, just don't let null results get you down. It's just an opportunity to reflect and iterate and learn ultimately. And keep practicing BI you have this new skill set, put it to use.

APPELT: I think those are two perfectly timed messages because our next cohort is in the midst of data collection and data analysis and then also wrapping, getting close to wrapping up. So those are two great messages for them that don't be discouraged and then keep on using BI because there's just so many uses out there and so many, so many amazing ways it's being used. Well, any last thoughts? Questions I should have asked and didn't? Anything else you'd like to share?

QUEISSER: I just want to thank you again for creating this awesome program and introducing me to the world of BI. It's really incredible the work that you've done, and I'm just really thankful that I can be a part of it.

APPELT: Aw well, that's very sweet. I mean, it has taken a huge village of folks, so the only part I can really take credit for is maybe the Facebook messenger chats that brought it on to your radar. But I will take a little credit for those chats, but it's just been such a great, that's another thing I love about the BI community is how everyone is so collaborative and excited about increasing and sharing that knowledge. So, it's wonderful that we're able to pull together a community of folks to deliver the program and then a community of folks who are just excited to be in the program. And that is definitely one of my favourite parts.

Thank you so much for joining us today. It's always a treat for me to get to talk to you and we don't get to do it enough. So, it was nice to have this excuse and I'm so interested to see where your BI journey takes you. It's really neat to hear the ways you're using BI and the ideas you have for continuing to use it. So, thank you so much for joining us today, Whitney.

QUEISSER: Yeah, thank you so much for having me. And don't worry, you'll hear all about what I get up to.

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