Episode 88: Using BI in Service Design, Knowledge Management, Quality Assurance, & Training

*with Kerstin Behrens-Bolt, Manager of Knowledge Management, Training, and
Quality Assurance with the BC Ministry of Citizens' Services.*

Kerstin Behrens-Bolt walks us through some of the intersections between service design and behavioural insights, including their shared goal of helping people. Kerstin also happens to have a fantastic eye for opportunities to use BI. She shares some of the opportunities she sees for including BI in the design of services, how knowledge is managed and shared, how quality is assured, how training is delivered, and more.

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 Kersten Behrens-Bolt.

Kerstin is Manager of Knowledge Management, Training and Quality Assurance in the Modernization Office at Service BC and Government Digital Experience in the BC Ministry of Citizen Services, which is hopefully the tongue twister I got right to start us off. It's an impressive title for an impressive person.

Kerstin is also a graduate of our certificate program. She finished about 15 months ago as part of the class of 2023, and she really brought a keen mind, a terrific attitude, as well as a service design background to the program. And so today, I'm the one who's keen because not only are we bringing that all to the podcast, but it's my first time having another person in the Kirstin-Kirsten-Kirstyn Family on the podcast. So welcome to the podcast, Kerstin.

KERSTIN BEHRENS-BOLT: Thank you. Kirstin, thanks for having me.

APPELT: Why don't we start with a hopefully softball question: can you tell us a little bit about yourself?

BEHRENS-BOLT: I have about 22 years of background in financial services and then 13 years, for the past 13 years, I've worked in the provincial B.C. Public Service. My roles have always historically been either service delivery, service design training, continuous sort of service improvement related issue resolution, service access kind of roles.

APPELT: Gotcha. So with the service design piece, I can see where maybe BI crossed your radar. Is that where it came up for you or what was your journey to BI?

BEHRENS-BOLT: It's funny, it came kind of from a few different places. So when I was first onboarded into government, I attended this training called the Public Sector Service Delivery Fundamentals, like right within my first week of employment. And it was very much about putting the service recipient at the center of everything you do, your decision making, taking into account their needs, their expectations, you know? So basically, they poured me the Kool-Aid, and I drank it and brainwashed me right out of the gate. So that was a

course that was very impactful for me, especially given my service background in the service design piece. And I thought, oh, how amazing.

And then, you know, over time, I worked with a group called the Institute of Citizen Centered Services where I became a certified facilitator of their training. And at the time, I taught the Understanding and Enhancing Access to Services course for them. And kind of at the time, the government of the UK had redesigned their website quite significantly, and they had these amazing design principles around accessibility and the design and function of their website. It was just so outside of what government websites usually looked like. And so that was, you know, that kind of led into some research and reading and their nudge unit and, you know, inside the nudge unit.

And then the Behavioural Insights Group joined one of our leadership meetings. And first of all, you know, showing us the work that they had been doing across the B.C. government, which was really impactful and interesting. And then we used the EAST framework to try and solve some problems at tables and groups, and it was just like, what is this? What is this magic? I need to know more about this. And that was sort of, you know, me being hooked, and that led to the participation in the courses through UBC.

APPELT: That's awesome. I love to hear about that. And I'm always, yeah, really impressed by the UK government. It's not necessarily what would come to your mind as innovative, but if you actually look, they do a lot of really innovative work and it's really impressive.

Well, kind of pulling on this, a common line of questioning I hear is about how does behavioural insights compare to different fields and approaches. And so I'd love to hear more about the intersections with service design, and it's an area I really don't know much about, and for me, I get tangled with the terms service design, human centered design, user experience. Could you help us map those terms and at least what they mean to you?

BEHRENS-BOLT: Sure. I kind of-- they're all related, and they go together. So I always think of them, and I sort of seen them visualized in the past of sort of concentric and overlapping circles.

And so if you think about the outside circle as being your human centered design piece where your user is actually defining what the service is, it puts the people at the center of the process. It's an empathetic way of looking at service design. And then the second sort of circle would be that service design circle, and within that, a whole bunch of overlapping things where it's sort of this holistic view of all the pieces that you need to have that come together, you know, when you're designing a service or product. So that includes things like the architecture of the information you provide to people, how that information looks visually, if it's online, how you interact with it. So if you're going to be the service recipient, are you going online, by phone or in person to access that service? The functionality and the usability, which are two different things, the content and the font and how, you know, the research piece of it. So the design research is within there and then all of it overlaps and that includes the user experience. So that UX piece, you know, the testing with the user to see what works for them, that is very helpful.

APPELT: I just, as you were speaking, doodled it on my Post-It note here. I think that's a very helpful… it reminds me, because we often talk about the Venn diagram of BI. So, yes, circles work for me I guess as a teaching tool.

So it's already starting to become clear, but can you talk us through a little bit about how that background in service design was helpful in learning and practicing BI?

BEHRENS-BOLT: I think when you're looking at service design work, you need to do a lot of research. And so that for me was really helpful coming into the BI space, because that's also the case and you need to do a lot of planning if you're, you know, doing it right, you're going to spend a lot of time in the planning phases to make sure that you've lined up all your ducks and you fully understand what it is that you're building and the impact it has. And so it's kind of the same when you come into BI, those skills really help you to have that planning lens and making sure you're spending the time and then having some skills in terms of research and being able to come at a problem from lots of different angles so you understand the implications and what you're solving.

APPELT: Having just wrapped up the problem discovery course, yes, hitting home 100%, that's what we've been talking about for three weeks is, spend enough time in this phase because it is so important. And I'm also wondering, it seems to me a real overlap is the idea of having the user, the population at the heart, so is that a commonality that you see?

BEHRENS-BOLT: Absolutely, because behavioural insights is all about understanding what people, you know, do and how they behave, and with service design, you have to bring that lens into it, which is why you hear a lot of this talk about human centered design. To really make something functional, you have to, I think, bring that empathetic lens to it and an understanding of how people are going to experience that.

APPELT: Absolutely. So that's kind of how the service design bleeds into BI. Any thoughts on the opposite direction, how BI can enrich service design?

BEHRENS-BOLT: You know, obviously the planning and the research piece. You know, if you do it well, it includes user testing and input from those users as you go on your building. And I think if anything, behavioural insights can show you that what people say they're going to do is not necessarily what they're going to do. Those can be two different things. So I think that having the options that you're testing when you're doing a proper behavioural insights research project, you know, sometimes we're testing more than one thing, and we're also having a control group. And so that gives you some real good insight into what actually is working in terms of how those users come at a service.

APPELT: When I first started way back, we won't go down to how many years ago, the first time you do something where you measure what people say and what they do, and you see just how big that gap can be, it's really illuminating so that is something that's always stuck with me. What do you think in terms of, are there barriers for combining BI and service design?

BEHRENS-BOLT: I mean, when you're talking about the testing piece, that can be, you know, especially randomized controlled trial, that takes time. It can, you know, you've got to measure before you got to figure out how you're going to do this. You've got to measure after. Sometimes it's a new service that's never existed before, so how do you measure that? And so it's time consuming, and people don't often have the time to do these things. But I think it's worthwhile, because even if you don't have a statistically significant result at the end, you're still learning something from that process in terms of maybe what didn't work. And it teaches you, you know, what isn't going to work in terms of the way that you have designed that service.

I always think about, there's a book called Good Services by somebody who actually worked in the UK government called Lou Downe. And they have this analogy and there's this quote by somebody called Cordelia McGee-Tubb. I'm going to read it for you and they talk about, it's about inclusion, but I think it applies here. "Inclusion is like making blueberry muffins. It's a lot easier to put the blueberries in at the start than at the end." You really need to understand, because if you bake your muffin and you haven't considered some really

important things and you have it tested to make sure these things actually work, you're going to have a muffin without blueberries, and you're going to try poking holes and jamming them in later.

APPELT: Which I think that we've all seen from Bake-Off.

BEHRENS-BOLT: Exactly. Yeah, exactly. You know, and I think too, you know, you asked me earlier about that human piece and the people at the center, and I think often services are designed for that 80%. But if you take the view through the lens of someone who has maybe a lot more difficulty in their service journey, maybe they need a screen printer or a screen reader, or, for example, my son has autism and he could never, never complete a service over the telephone. Like he just, the telephone is like a no-go zone for him. You know, if you make sure that your service is designed to work for that 20%, then it's going to work for everybody.

APPELT: I love that metaphor of the muffin, too, because I think it also really goes through, sometimes when we're talking about BI and we talk about the need for evidence base, we talk about these examples of these programs that just seemed like they'd work, and then they were such spectacular failures and so much resourcing went into them. And if you build with your blueberries along, I don't know, maybe I'm mixing metaphors now, but if you're doing BI along the way, you're learning.

And one of, going to fabulous quotes from folks associated with the UK government, they have one that I will terribly misphrase around how when you're doing BI and testing, you're learning as you go. So the learning is these, what you would think of as small failures, they're learning opportunities, and then the actual program is a success rather than a massive failure. So it just it really is, to go back to your original point, worth the time. It takes time, but it's time well-spent.

BEHRENS-BOLT: And the more time you spend really understanding all of your service recipients, the better your final product is going to be, because it will work and you haven't missed something important. That means somebody is going to hit a dead end.

APPELT: Yeah, yeah. And we could have a whole separate conversation, but I also think it also starts to get to the idea, sometimes we try to use the single tool for all folks when we realize that, you know, there's places where it can be different journeys for different folks, and it might take a little bit of time upfront, but then you're really having a positive impact. And also, I'm always of the opinion that we as the people designing the programs, policies, products should be doing the hard work. It shouldn't be on the end users to do the hard work. It's hard for us, so it's easy for them.

BEHRENS-BOLT: There's research out across Canada called Citizens First which is done by the Institute of Citizen Centered Services. And the most recent research from 2023 shows that in BC, only 25% of the people that they surveyed thought that the service they needed was available online and that they could actually complete it online. So, and then when you compare that to the 80 something percent who expect to be able to do the service online, that's a big gap, you know. And how do you bring them that information and how do you guide them to go there if that's where they want to go? How do you make that path easy and remove the friction?

APPELT: Yeah, absolutely. So it sounds like we're starting to talk about some potential opportunities. So what opportunities do you see for combining the BI and service design?

BEHRENS-BOLT: You know, I always think about the behavioural insights book from Hallsworth and Kirkman because they say that BI applies evidence about human behaviour and it can show us what is really driving actions. And so to me, that's, I think, probably the biggest opportunity because we can engage with people all

we like, get their feedback and their input and their ideas, and then when we build the thing, that's not how they use it, because what they say and what they do are two different things. And I think evidence-based research is always the best way, and that is where I think the real win-win happens here.

APPELT: Yeah, that makes a lot of sense to me. And also how sometimes things were designed a long time ago. And it wasn't that it's always been done that way because it's the right way. It's just that someone decided to do it that way back in the day, and so it's just a legacy system.

BEHRENS-BOLT: And it's the only way at the time, maybe.

APPELT: Yeah, as we look at some of the muffins that are out there, maybe, some of the blueberries need to come out or need to be rebaked. So yeah, it looks like there's lots of opportunities. Thinking of opportunities, you've been out of the program for a little over a year, and you're now in this new role, manager of all the things. So I thought maybe we could talk about some of the opportunities to leverage BI. And since it is a broad role, maybe we'll take them piece by piece and we can talk about knowledge management first.

BEHRENS-BOLT: Knowledge management really is about capturing organizational knowledge and the things that you need to know in order to do your work, and codifying it somewhere in a place where you can access it easily and retrieve the information.

And so for us that's certainly very impactful on the front line when we're, you know, serving people face to face, because we deliver a lot of services at Service BC and it's a lot for an employee to know, and you can provide the training, but, you know, one person's brain can only hold so much information. And so it's nice, especially with some of the more complex programs, to be able to go to somewhere and look at the details.

So when I think about the behavioural insights piece, besides the change management that needs to be applied when you're doing anything new with people, I always think about how people get to the action piece. So, you know, are they motivated to do it? Are they able to do it? And when it presents itself, what is the barrier or the friction point that is preventing the behaviour?

So, you know, if you think about a knowledge management system, when the rubber hits the road and the person's standing in front of them, are they thinking, I remember how to do this and I'm just going to do the thing, I'm going to ask the person standing next to me that I work with, I'm going to Google it, or do I go to that knowledge management system and get the correct information, right? Because where's the friction? And how easy or simple is it to use and find the information you need, right? So you have to kind of, that's how I sort of break it out in my head.

APPELT: Yeah, I really like that. And I'm laughing because I just think of all the times we get questions and we're just like, we want that auto reply, "let me Google that for you", because that is the easiest way or the other auto reply that faculty always need of "it's in the syllabus".

BEHRENS-BOLT: And not to say, you know, just an example of how that could be applied to knowledge management to sort of remove any friction that might be in place for people, right? Yeah, just as an example.

APPELT: Yeah. I love that one too, because I think there's always this line with knowledge management of, you want to have it be comprehensive, but then sometimes comprehensiveness gets in the way of making it low friction to find what you want.

BEHRENS-BOLT: Easy to digest, and yeah, especially when you've got someone standing in front of you and you need to review that information and have it served to you in a way that's, you know, consumable so that you can provide this service.

APPELT: What about the quality assurance piece? Where are opportunities there?

BEHRENS-BOLT: I think that, first of all, you could think of quality assurance as a quality management program, but it could, you know, there's data involved and error rates and error information. And it can certainly provide insight into problems that you're trying to solve, so be part of your research. But I think that in and of itself, it can also surface problems that need to be solved, you know, and give you the opportunity to use behavioural insights to solve those problems.

APPELT: Mhm, yeah. So it's a good way to create your BI agenda of projects like that.

And the other piece, training, that's one that I've certainly given a lot of thought to in the creation of the professional certificate. What opportunities do you see?

BEHRENS-BOLT: I had to really think about this one. I think there's a few different things.

So, you know, people sign up for training. There might be training you require them to do, that's mandatory. And, you know, people don't always finish what they start. And so how can you leverage BI to get people to complete their courses? So maybe nudge at the messages that can be used to encourage, you know, the completion of training, that we could use a behavioural insights approach to enhance the learning and training somehow, the approach that you use, you know, whether that's the EAST framework, some of the nudges that might work or using a research approach to actually create training. You know, what is the most impactful way to provide that training to people? So that at the end, they've taken the most information away from it, because some people can take training and it's not necessarily built for them, but they can also go through it like an automaton if it's self-serve and it's like blog post, quiz, blog post, quiz, you know, kind of boring, you know. How can you make it more effective so that people are absorbing the things you want them to learn?

APPELT: I was doing a training the other day where if you alt-tabbed away from the screen, the video stopped playing, which was very smart.

BEHRENS-BOLT: Hahaha, tricky.

APPELT: It also makes you think of what you're saying under knowledge management too, of you want the training to cover all of the things, but you also need it to be in digestible bits. So similar to when someone's in front of someone trying to deliver a service and being asked questions, how can we make the learning chunked in ways that will, like, actually be digested and not just a stream of information passing you by that's too much to take in?

BEHRENS-BOLT: Exactly. And when you think of those three pieces, they fit so closely together. And if you inject BI, behavioural insights, into that, you know, it can really help give a real holistic view and allow the design of the information that goes into your knowledge management system to be linked to the training really clearly. And, you know, the information that you're surfacing through your quality assurance or quality management program will help drive those things.

APPELT: Now I understand why you're manager of the three, like, they do go together. Before I was just like oh my goodness.

BEHRENS-BOLT: There's actually three of us that do that work and have that title, and we work very, very closely together because it's all just so closely related.

APPELT: Well beyond what we've already talked about, are there any other particular concepts or skills that have really stayed with you?

BEHRENS-BOLT: I think the planning piece, for sure. It's something that when we went through our project work course we definitely learned you have to really be sure that you talk to everyone who can help you. Relationship building is like the key, but also have a plan A, plan B and plan C and a plan D, etc., etc. because we certainly thought we had it all figured out, but it turned out we hadn't talked to everybody who was involved and it created some friction in our project that required other iterations of a plan.

And so you have to just be prepared, but also in the planning phase, really make sure that you've met everybody in the organization who could have any kind of impact or input and say into the work you do. So we could have an assistant deputy minister and executive directors sign off and go, oh, yes, we're in, but the managers weren't included in that conversation, and they're actually the ones that put the brakes on the project for us, right, so it was like, oh, wait a minute, include everybody if you can have conversations all up and down.

APPELT: Yeah. That is so true. Yeah. And again, something we've talked about the three weeks and we had a couple of alumni on sharing their experiences and that was on both of their lists of top things was include everyone, talk to everyone and everyone.

Well, when it comes to BI, what are you most excited about? And maybe we've already covered it, but is there something that particularly sticks out for you, whether it's an idea or an event or research or anything else?

BEHRENS-BOLT: Just seeing the opportunities and actually seeing the applications and where it's being applied. You know, when I looked at the training piece and the application of behavioural insights and I had to think about that a couple of months ago and doing research, there's not a lot out there in terms of behavioural insight application to training. So I'd love to see more of that.

But I look around, you know, government especially, and I just see so many opportunities. You know, this past summer, we did a project with Emergency Management BC where we supported some of their wildfire responses at reception centers, and I was like, oh, they're doing some work to get people to register ahead of time with their BC services card, create their profile. So there's no emergency yet, but I'm logged in and I have my profile created, so if there is an emergency, I'm more than halfway there in terms of registering for support. And I was like, oh, behavioural insights! Come on you guys, this is a project, it's waiting. You know, being able to leverage it for things like that. And then evidence-based, this will work, this will get people to create their profiles and be the most impactful way to have British Columbians ready in case of an emergency, you know.

APPELT: Yeah, that's a really important one. Yeah, and I agree I think that the opportunities we see where it can have meaningful impact on people's lives are just so exciting.

Well, I'll transition to my traditional wrap up questions, so do you have a message for our new BI practitioners in training, whether in the program or just folks kind of discovering the field for the first time?

BEHRENS-BOLT: I would say that as you're participating in the course as part of a team, teamwork becomes probably one of the most important things. My director is amazing, and she had this quote, "let them wear the tiara". So I encourage you to let other members of the team wear the tiara. I think that really can drive teamwork positively.

I would say relationship building, whether you're a practitioner or you are working through the course and doing a research project that what my husband calls "friend-raising" piece becomes really, really important. We made some amazing connections when we were doing our research, and we were doing our planning and the connections that we made and the information we gathered from those individuals was incredible. And my experience has been that people in this community are very open to sharing and really want to support.

So, you know, I had reached out to one person to say, hey, I saw something online about this research you're doing. We think it might be applicable to something we're working on, there's not a lot of information, I'm looking for more detail, and they are just like, here you go, and then they'll introduce you to someone else who will introduce you to someone else, and so on and so on. So I think the relationship building is key.

APPELT: Absolutely. Yeah, I love that. And it also is reminding me of something I saw online where sometimes this-- you'll see in like conspiracy theories about like scientists are hiding information but if you ever talk to any scientists they're like, let me tell you about my findings, someone finally who's interested, here's my deep dive into my work!

BEHRENS-BOLT: Absolutely, yeah. We didn't come across anybody who wasn't, you know, willing to share or help or, you know, give some insights into what they'd learned and point us at some more research we hadn't found or considered. It was well worth the effort.

APPELT: Yeah, that's one of my favorite things is how excited people are to share, because we all have the common goal of helping people.

BEHRENS-BOLT: And not to be afraid to send that email or to make that phone call or to reach out to that person because you think, ah they're important and their name is on a book or on a research paper, you know, but they're probably happy to talk to you. At least that's been my experience.

APPELT: Yeah, most of us are just like, oh, someone wants to hear about what I've done, this is exciting. So yeah. Yeah, I love that.

Any last thoughts, questions I should have asked and didn't or anything else you wanted to share?

BEHRENS-BOLT: No, I think it was really comprehensive.

APPELT: Wow, did we balance comprehensiveness and digestibility? Did we do it?

BEHRENS-BOLT: Hahaha, I hope so.

APPELT: Well, thank you so much. I had an inkling this would be an interesting conversation, and I was so right. This has been really cool to think about the avenues to apply BI and how it complements some of these other skills, and I think you have a really good eye for BI opportunities, so I'm excited to see what you can do in applying BI to knowledge management, quality assurance training and beyond. So thank you for joining us today Kersten.

BEHRENS-BOLT: Thank you Kirstin for having me. It's been lovely.

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