Episode 103: "Lead with Curiosity"

with Joana Katter, Research Lead for Policy & Program Research at Immigration, Refugees, and Citizenship Canada

Drawing on her experiences working in academia, government, and the private sector, Joana Katter shares advice for finding BI roles and creating community. We discuss the importance of leading with curiosity and humility, especially when you're part of a cross-functional team. We also talk about the many different contributions BI projects bring to the table and the value of planning projects so that there are wins along the way (and not just at the very end).

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 Joana Katter. Joana is Research Lead for Policy and Program Research and Service Insights at Immigration, Refugees, and Citizenship Canada, or IRCC. Joana has a PhD in Psychology from New York and has had just the most interesting set of roles along the way. She's a research assistant with the Department of National Defense, an intern at the Strategic Council Market Research Firm, a postdoc at TD Bank, a Mitacs Science Policy Fellow at the BC Ministry of Mental Health and Addictions. So, as you can imagine, we'll be asking her about her journey to her current work, as well as hearing more about that current work. Let's jump right in and welcome to the podcast, Joana.

JOANA KATTER, GUEST: Thank you, Kirstin, for the very warm welcome. It is a pleasure to be here.

APPELT: And we always ask us to start off with what's hopefully a softball question. Can you tell us a little bit about yourself?

KATTER: I think you did such a good job of the introduction. It's hard to follow up. So as Kirstin very ably described, I am a research leader the federal government, or I have the privilege of working in the immigration area. I'm embedded in a service strategy division. So, we're an embedded research team where we spend a lot of our time using behavioral science methods and knowledge and expertise to try to improve client service for immigration clients across the board.

APPELT: So interesting. And I've teased this next question already, but what brought you to apply behavioral science? What was this amazing journey? What were the stops along the way and why?

KATTER: It's interesting to think about now where I am in my career, but I think I was always really interested in applied spaces. My PhD was in social personality psychology in a time kind of before BI was its own

discipline, but I was always in applied spaces throughout graduate school, the association that I was in. So, the International Association for Applied Psychology, Economic Psychology Association. So, it was always at that intersection of how research works in applied spaces. So, I think it was just never not applied. It was really an evergreen interest of mine in terms of how can we bring this knowledge, this insights to the real world. So, it's always been there.

APPELT: Fascinating. And something that resonates with me because I love bringing the science outside of the lab. So, you do have this PhD in psychology and have worked for these different organizations, and they are quite varied. They're in different sectors, different focus areas. Can you speak a little bit about those experiences and how it made sense for psych PhD to be there and what you did?

KATTER: Certainly. I think the thing is to kind of know what you're interested in in, order to watch out for those opportunities. Some of my internships were part of applied practicums within graduate school. So, finding opportunities and existing partnerships, past graduates. And also, really watching for those programs like my work with TD and my Mitacs fellowship or both of that Mitacs program. So, there's other supports out there. So, I think as a researcher, you can research, right? And watch out for those spaces and those opportunities and see what's out there because we're in a very fortunate time now when you're not going to be the first person who's tried to do this. You sort of see who has been successful, who's made that leap and try to do what they do.

Cause like, as you said, I did fellowships, I was in government, and that brought me to where I am today where those sort of experiences and training that you get along the way, right, those fellowships designed to bring academics to that public sphere and those bridging experiences where I think what's helped me a lot is having those, being that researcher within a bank, within a government department, and sort of learning that like verifiable lesson of "you have a PhD, but so what?", right? Like, what does that mean? Like, how is, how are you valuable? Prove to me, like, why what you do has value. And I think something that a lot of researchers and academics need to know is that, your skills are transferable. You have learned to this can contribute, but you have to be ready to make that case. They won't hand it to you.

APPELT: That resonates a lot. I remember when I was first doing some consulting work and people were giving me advice for how you change a 10-page curriculum vitae into a one-page resume. You have to translate for them. And I was like, but translate to what? I don't know the other side yet.

KATTER: You don't want to know the full list of my shirk-like funding? You don't care that I've gotten the fancy version and not the fancy version? It's definitely a mindset, but the skills involved in that justification, knowledge translation, those all matter in these contexts. You just have to make that little leap.

APPELT: And you have to be the one to do the leap, they're not going to make it for you. I think that is really good advice and great that you picked that up throughout grad school and not having to wait until after grad school to understand that. So, kind pulling on these threads a little more, you've worked on a lot of different cross-functional teams trying to understand or change human behavior. And cross-functional teams are super beneficial, but they also can be challenging when everyone's bringing their own expertise. So, I know you've talked previously about humility being really crucial in that puzzle. Can you expand on that idea?

KATTER: Humility is really interesting to think about in this context, because I think that kind of humility and readiness to engage in that level is true of all collaborative environments, but it's also an especially when you're as like an innovation discipline, where there's this danger that you're going to come in as this expert parachuting in with all the easy answers and the miracle fix. Where I think it's really important to recognize that everybody at the table you're going to be brought to has expertise and expertise you need. And failing to recognize that sort of relational aspect of like, what are they an expert in? I'm going to often be the BI expert, the one on research methods for sure, but not necessarily, there's other research disciplines. But I won't know as much about the subject area.

I won't know about the work to date, the challenges they're facing. If a problem is important enough to bring someone like me in, it's often not going to be the first time they try to solve it. So, having an awareness of that history of what's been tried in the past and what will happen in the future, what are those barriers limitations, right? It's very easy to come in thinking you have a really obvious answer and not recognizing that maybe they've tried that already.

If it's genuinely that obvious, telling them it's that obvious could be insulting. So, it's not great relationship building. You don't tell them, oh, did you not notice this quote unquote low-hanging fruit that you could very easily achieve? But oftentimes, it's the illusion of a low-hanging fruit. It's not actually as easy as it is. If they've invested in a BI expert to come in, it's not usually as simple as it might appear.

APPELT: That's such a good point. And I think it really is true from a number of different lenses. There's just the feasibility piece of the systems might now allow something or it might be the legislation doesn't allow something. Or it could be that you coming in so, so hot and heavy haven't really understood the problem. And so, you're assuming wrong barriers. And so, there's just a number of ways those assumptions can really run up against a wall.

KATTER: And you do bring something new to the table, right? And you're, but the newness is the perspective, not the subject matter knowledge. I think as a BI person, often I'll connect to new areas together. I'm like, oh, for this operational team that's really applied, have you considered the policy or have you bridged it with the tech person? Because we do bring in that new lens, but it is a lens. It's not just the only important part of the story that's being told and being developed over time.

APPELT: I think that also speaks to a point we often make in the courses, which is that BI is this additional piece, not the piece, it's not the silver bullet, but when you combine it with other things like change management or lean or legislation, then that can be really powerful. So, like you said, relationship building is a really important part of these.

KATTER: Managing relationships and consulting with people, both your partners and the clients you're serving super critical. I think this is starting to get to my next question, which is that the reality of most projects, whether they're BI projects or other projects, is that they don't go down this nice little path that we have laid out for them. There's often bumps along the way. And sometimes that means we pivot. Sometimes it means a project has to stop earlier than expected. So, what advice do you have for finding wins along the way?

KATTER: It's really how you ask that, my advice for BI in the workplace is very similar to what I used to advise PhD students. Where it's sort of design your project to get value at every stage and be ready for things to fail

and not work, right? You don't want to sink all your eggs in one basket that's going to have to have a year of work to have that one paper at the end, no.

Set it up so that even if your hypothesis fails or something gets stopped along the way, you still have value. That can involve just thinking about yourself as building the evidence base and the evidence starts in that preparatory stage, right? You your lit review. Especially if you document it, thinking about this evidence base has value, even if the trial doesn't happen, right? Your development of questions that might never get asked has value as an artifact, as long as you're archiving it in the right way.

And then in terms of be ready for pivots and shifts, which happened in government, happened everywhere. It's really considering what are those evergreen questions? If there's going to be a delay in launch, right? What questions will no longer be useful six months from now? Is it the whole survey? If so, that's obviously going to be a problem. But if you've taken the time to think of what are those evergreen challenges? What are those elements that I can include now that will still be useful months from now? In worst case scenario, a year from now, someone else completely picks it back up and has to take on your work. And not getting too distracted about the flavor of the day or the tasking. So, protecting that broader perspective and sort of seeing where can I provide value? And as a public servant, how can I use the resource that is myself most effectively to sort of support our goal of client service, even if it's not completing a project from tip to tail?

APPELT: That makes a lot of sense. And I particularly like the idea of getting value at every stage because I think a lot of times when BI is newer to a project area, people get so focused on the trial as it's the new thing. And so that's where the crux of the evidence is going to be. But then when I have students who are going through at the end of a project and they're compiling the recommendations, they start to realize that the recommendations coming out of the trial are only a small portion of the entire set of recommendations and observations.

Like you said, even from not even just the literature review and the exploratory research, but also sometimes just by the nature of doing the project, you realize that it's really important for this team in the future to rethink how they manage their data because currently the data set isn't structured for data analysis or just these other process learnings along the way.

KATTER: Especially when they're new to research setting up a sort of monitoring sort of landscape so that they're capturing data at baseline, right? Because baselining as you're innovating, challenging, but having that early win of like, yeah, they might, we may never get to the trial. It might get scrapped. But they're at least monitoring and watching out for and building that kind of foundational knowledge that can be very useful. Because like, yeah, the trial might not happen.

And also, it's not good to get anchored on that one benefit or that one outcome that you were told you're trying to do, monitor the rest of it, right? Cause if it works, great, you've had that one KPI. If it doesn't work, right? If you're not building in those supplementary measures and metrics and whatever, you can't diagnose why and you can't move the project forward. Beyond that single metric. So, having that kind of broader lens of like, how can I make this as useful as possible, right? And serve multiple audiences, right? Sort of consult a broader range of people, related questions, how can I have more bang for your buck in that way? So, serve yourself, serve your teams.

APPELT: And I think that also is really helpful for most cases. You're not hoping that this is the only project you ever do in that space. You want to come back or you want to enable them to do future work. And so, the more you have recommendations throughout the entire process from scope to scale, the more runways built for future projects. So, speaking more towards the end of a project, one skill that I really found that I didn't develop well in my PhD program and that when I first moved to applied research that I really didn't even realize was a skill that was needed. Was translating statistical results into actionable insights. So, moving from like with P less than 0.05, blah, blah, blah, to here's the so what. Is that something you see that is key? And if so, can you talk a little bit about that?

KATTER: That translation piece really is critical, right? Like being able to translate your own insights, your own projects, that whole stats report does have to exist. It has value. Somebody out there might read it. It won't be seen in leadership. So, a piece of advice I got early in my Mitacs fellowship in the Province of BC was pretend your senior leadership is illiterate, right? They're not, but they're so busy that they might as well be, they can read three sentences and the need to be able to have a clear, brief, actionable takeaway.

You found this finding, this is your graph, this is your figure, it's beautiful. So what? What is the point you're trying to make? And you often as a researcher, you'll know the point. You just have to put it down on paper because your choice is really that you as an expert give me that perfect sentence or someone up the chain will do it for you and they'll do it not wrong, but they won't have your benefit of expertise coming into it.

So, I think graduate programs are making it increasingly easy to get better at elevator pitches, right? You get taught that you should be able to give an elevator pitch like a one-minute, two-minute spiel on your own research. But your goal in this context is to be good enough at that skill so that your senior leadership can themselves do an elevator pitch on your work. So, you want to really build an understanding, give them the tools so that your senior leaders can then bring that idea higher levels above you and to really train them and teach them and give them the bullets, give them the understanding so that they can talk about your work in those other audiences that you don't have access to. And that's really the goal in terms of the communications. I understand, I want you, my leader, to understand, and I want them to understand so well that they can also talk about it.

APPELT: That is really well said, and I think part of what's interesting is that in order to do that well, you have to know your own stuff really well. It's actually harder to be succinct than it is to spend two paragraphs getting into the minutia, being able to abstract out and get the really core idea and say it clearly is actually is something that takes work. I think it often gets underestimated, especially when you're new to a project, you get so excited about the project that you're like, but then we have to talk about this and this and this. And it's really hard to just focus on the core message.

KATTER: No, it's like writing a really good abstract, right? You spent like months and years working on the rest of the paper, the, the abstract, some people will stop after they read it. And if it's really good, it should have value, right? In terms of those right-sized pieces of information to share out.

APPELT: It should be able to stand alone. And I think another way of talking about it too that I sometimes use with students is you're not only writing for your executive, but your executive's executive and your executive's executive's executive. And if you think that high up, they've got so many projects, they're not spending more

than like a minute or two on yours at most. So, getting that really, like you said, the elevator pitch, the really brief version is really important.

KATTER: Help them help you, help them become your champion in your work.

APPELT: Yeah, that's a great way to put it. So, another idea around working in these cross-functional teams is that often it means that you're the only BI professional in a given team or even sometimes in a branch or an organization. And that's really cool because you're getting to work with these other folks who have different wisdoms and experiences. But then it can also feel a bit lonely sometimes. And I think that's something I've heard from some of our BI grads is that if you're the only enthusiast or expert, it can feel like you don't have community. So how have you built community? How have you made it feel like you have resources and peers?

KATTER: Building community, I think, involves a certain degree of effort, right? Where if you are the only explicit BI person on a team, you might not be the only person with that expertise or that skill set or like that knowledge. So, you have to look across units, across sectors within your organization to find your compatriots. There might be other research teams like in my division, there might be folks of similar skills or interests. I've worked with lot of service designers or UX researchers where they have a similar kind of like mindset, if not the same training or expertise as I do. So, it can be really valuable working with other groups.

But also, I think it's that outreach component, right? Like part of that communications, translation element of it is to sort of teach people about your area, right? Tell them more about yourself, sort of build those networks, build that interest so that you're not the only person with this interest. We've had great interests in our organization with journal clubs, both about pure BI, but also as academics talking about your own background, what was my research?

We had a really interesting talk about one of my colleagues who had before going into BI been a relationship researcher talking about Love Island type bachelor shows and how BI and science can kind of make people interested, right? Make them understand what it is you do. How what you do isn't this weird, rare outside thing, but like, no, like what you do has value and has interest and like people are always eager to learn. And then it all fits into that thing about you're creating this network to get the buy-in. Cause this is good for your BI grad. That are not feeling alone. But it's also this kind of relationship building across your organization that sort of gets you that groundswell of support to have uptake, right? That's how you find a research partner. Or that's how people know to come to me to like, hey Joana, you're a great researcher. I met you at this thing. Why don't we do a research project on this? And that's how you sort of build that network in your organization.

APPELT: I really love that you brought up so many great points there. And I like the idea that you're doing it not only to find community and so you feel supported, but like you said, also to find future projects and also to find the parallel skills that other researchers have.

KATTER: You can learn from them, right? It's hilarious as a professional in applied cross-disciplinary spaces. You'll have a BI person describe what the benefit of experience is a service design protocol. And I'm like, as if they've invented it, I'm like, no, if you work with service designers, these skills exist out there, right? From like participatory action design, there's other researchers doing things in other ways. And like, you learn, they

learn about you, you'll learn about them, that knowledge transfer is so valuable to make your work richer and richer when you're no longer anchored to being like a pure BI person by being someone more embedded.

APPELT: I think also, like you said, you also are finding new applications and ways. I've been having some conversations with folks who are change managers and I'm finding like, oh, there's so many interesting ways where we can pull these two skills together and tackle things that I wouldn't have thought of unless I've had these conversations.

KATTER: And as you get embedded, you do both. Like I've gotten training in change management, right? So, you bring your skills, and you come to the table and then you sort of bring them into new spaces, you collaborate and it's much richer doing it that way.

APPELT: Well, maybe doing a little bit of a dive into a specific place where you've worked in cross-functional teams. I think Immigration Refugees and Citizenship Canada is such an awesome place to be doing BI because really, it's really people focused. So, I'm wondering if you can tell us a bit about some of the work that you do at IRCC.

KATTER: For sure. It really is an interesting place to be doing BI work. And I think I'm also privileged that I'm in an organization big enough that I'm not the only research team, right? We're not the only part of the research landscape. We have colleagues who work in other types of research along the client journey, public opinion, evaluations, outcomes. So, where our team and the work I do kind of focuses is in that kind of behavioral and factual research, right? So, what's taking that knowledge from BI in terms of like, are the barriers and facilitators? What is everything else? And sort of working on immediate client experience. Like someone who's interacting with our products and services, what happens to them? How do they feel?

And I feel super privileged being in this department because we have the ability to work with like real live clients, actual people engaging with our systems and not just a generic participant pool. But with that, comes the really big responsibility as a public servant when you have that trust of access to sort of like use that access responsibly and sort of be super conscious of the value you're providing and how you're working with your population.

So, one thing to keep in mind when your work is as operational as mine is and a very service design actual clients, I'm not often in a place where I can run a randomized control trial. We're not able for the feasibility or for ethics, we can't sort of quote unquote experiment on our population. So, you're pushed in a really interesting space, methodologically, survey work or quasi experimental designs or those sort of staggered protocols for evaluation, to sort of use those other ways of doing work to sort of explore how does the rollout of this program or policy come into bear? What are the factors? Or I might use my BI expertise to say, great, you're doing this. Work from BIS taught us that these are the key levers. Let's measure them, right? Let's conduct a survey, see which ones are relevant. What are those gender-based analysis sort of factors that we have to bring into bear? So, it's challenging having to do work in this very applied space, but ultimately super rewarding because when we have impact, you can see lives getting changed.

APPELT: It sounds really rewarding having an impact on these populations and in real time. I'm curious because you mentioned that you're one of several teams and there's also public opinion research and

evaluation. I'm wondering if you can just tell us a little bit about some of these terms and what they mean and how they're similar or different from your team.

KATTER: That's an interesting question, partly because it also feeds into your BI grads trying to get jobs. Teams labeled BI might be rare. Teams where their skill sets have impact and value can be a much easier thing to find. So, our colleagues in public opinion research, it is a major function in government. They do consultations and they talk to general public. So, my work deals with clients. So those interacting with our system, public opinion research has to do with the general population. So, anyone can be part of a public opinion research study.

Evaluation is also another team that many departments like my own have. And evaluators tend to be looking at those end outcomes of a program. And evaluations tend to happen on an annual or multi-annual, so three years, five years cycle. And then those things get published, they're available on our website, and then they inform program and policy design. They're also the teams that tend to do quite a bit of work in partnership with other departments.

For example, IRCC has evaluations tied into StatsCan outcomes. And again, that you could find online in terms of like, what are the outcomes? What are those databases that connect the data? So as a BI professional in graduate school, you have access to these resources and also to these different career titles that all have an intersection of BI and it could be places you could get a job eventually that aren't purely BI.

APPELT: Often something a field studies is not something it's good at. Like BI, we say things should be easy, but then we make it really hard to find roles because they're never called like a BI person. It's always something else.

KATTER: There's a handful of pure BI teams or the teams that were at least one time, but things shift, title shift. I think my official organizational chart is just some sort of research and evaluation analyst. That's a generic title that covers my role. Which doesn't mention BI at all. It just happens to be a research analyst in a BI team. So that's my focus, not my title.

APPELT: And then also it just varies so much between organizations and between sectors. Knowing a title in one place doesn't always help you when you go to another organization.

KATTER: So, looking at the description of the role, right? It's interesting to me, looking at the kind of work we do as BI. If you look at a tech company, you're often looking at qualitative researcher jobs because in the tech sector, if it's quantitative, which is like in psychology, I'm a quant type person. Within a tech sector, a quant person is much harder data science, right? So, sort of learning those things about like, what does the work I do look like in different sectors and looking at the actual skills? I mentioned service design and research teams. I post like a TD Bank was in a service design research team. It was BI work, right? That's what I was doing personally, but the name of the team and the sister discipline was all kind of blur together.

APPELT: You can't see, but I'm nodding rapidly. Well, we've been talking a lot about grads, so I'm wondering if we want to transition to asking if you have a specific message for BI practitioners in training or just folks who are new to the field.

KATTER: I do, and I am quite proud of it. My message is that you should be, you're aiming to be curious and not clever. Or it really ties into that humility discussion we had where it's important to be, have that humility with your partners, but also thinking about your goal to really understand the clients you're seeking to serve, right? Like your goal coming into it is sort of have that empathy and observation and grounding what you're trying to do in those lived experiences of people you're trying to serve. And then bring those outcomes to the table by using your skills. You're going to be a smart person, but you're surrounded by smart people. So, you're not trying to be the most brilliant person in the room who's bringing your grad experience forward. No, you have to be genuinely curious, generally care about what's happening. Be curious, not clever.

APPELT: I really like that. Think that's, especially when you're new, can be tough because you just want to come in with that cool solution. Lead with curiosity is super important.

KATTER: Don't put the pressure on yourself to be the smartest person in the room. It'll come. You'll have the experience, you'll have the expertise. You'll come into the confidence in your knowledge and skill set. That should not be your goal.

APPELT: Well, there's advice that I could have used 20 years ago, but at least I'm getting It comes with experience. And over time, you'll get there. Everyone gets there. 100%. And when you feel more confident, then you're able to be living in that curiosity and then adding value here and there and not so focused on adding value that you miss the curiosity.

KATTER: No, and not being scared of those mistakes, because it's only with that experience and knowledge that I know now when to push back super strongly. When it is time that, no, this is a line in the sand. We can't do it that way. We have to do it this way. But that's only come with embedding and learning over time. Can't from day one have that thing about like, this is way to do it. You don't actually know, you have to build it over time.

APPELT: Actually, I think that's a really good point too, which is it's related, but it's also this distinct point about it's, I think, really a learned skill to know when to push back and when not because I see new folks doing either going hard and saying no compromises, we have to do this, or just going the opposite way and saying, oh, well, okay, we'll switch. And then sometimes you lose so much of the BI that you're not actually doing BI anymore. So it is, I find over time you learn where you can make the compromises and where you need to stick to your guns.

KATTER: And also knowing what this fear is where you could do that, where I feel fairly confident in pushing back on methods. But the goal of a project, et cetera, a maxim we use in government is: fearless advice and then faithful execution. Right. So, you push, but we are public servants. We are working within that context. When the decision is made, is then your job to execute it. But never be afraid or obviously qualify your fear. Be a little bit afraid, be cautious in sharing your strongest opinions. But there is a time and place to have those strong opinions and then there's a time and place to sort of understand that other people might know more than you do.

APPELT: That is really good. Well, since you're giving out all these pearls of wisdom, any last pearls of wisdoms, anything else you wanted to add or anything else I should have asked and didn't?

KATTER: I think it's a really great discussion, Kirstin. I hope it's valuable to other people. I hope people enjoy listening to my thoughts on this space. And I think that introductory where you learn about BI, but what does it look like in the real world, at least in my context. And I'm really happy to share and I hope that people learn something. And if they want to, they can reach out to me.

APPELT: Awesome. I mean, can't imagine people not finding this valuable. You've had so many interesting experiences, and they've really manifested in this interesting work and these great insights about the process. And I remember the IRCC presented at one of our early Big Difference BC conferences like five or so years ago, and it hadn't even crossed my mind that that was a place where BI might happen, and so I love that you're always seeing these opportunities in these different organizations and I think you really come in that curiosity. I see that in you applied not only in the work but in how you approach the work and everything else. So, I've been super curious to talk to you and it has not disappointed at all. It's been a really fun conversation.

KATTER: Thank you, Kirstin. It's been great.

APPELT: So, thanks for joining today. Thanks for doing the work and we can't wait to hear about what you continue to do. Thank you so much. And thanks to our listeners for joining another episode of Calling DIBS.