



Episode 107: "Surfacing Barriers & Designing Solutions"

with Clea Stone, Associate Director at The Sound.

Because Clea Stone recently completed the Advanced Professional Certificate in Behavioural Insights to complement her existing skillset from a decade of work in market research, she's perfectly equipped to help us explore the intersection of market research and behavioural insights. To wit, Clea brainstorms opportunities for integrating BI into market research and profiles qualitative research techniques that can round out the BI repertoire.

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 Clea Stone. Clea is an Associate Director at The Sound, which we'll hear more about shortly. I first met Clea when I was teaching marketing research to UBC undergrads and I was looking for a guest speaker from a market research firm and fortunately for me, someone recommended Clea. And she gave the students such an amazing look at some of the fascinating qualitative research she does that I invited her back every single time I taught the course.

Flash forward several years, and I had the pleasure of seeing Clea in the classroom again, this time as a student in our advanced professional certificate in BI. Today, I'm really excited to talk to Clea about her journey and the rich intersection between market research and BI. So welcome to the podcast, Clea.

CLEA STONE, GUEST: Thank you so much. I such a great time doing those guest lectures way back when. It's great to be here. And we're happy to have you. Can you just tell us a little bit about yourself to start us off? Sure. So, let's see. I grew up in Florida. And yes, everyone loves to send me Florida man memes.

I did my undergrad in film and psychology in New York, and I worked in Delhi, India for a few years before moving to Vancouver where I did my MBA at Sauder. And I've always been really curious about how people think, feel and behave, especially when it comes to the role of technology in our lives. For example, my undergrad thesis was a documentary video installation about death on Facebook and all the weird and new behaviors that were happening around that. Post grad school, I found a natural fit in the world of consumer insights consulting. It's kind of like this intersection of culture and behavior and strategy. And it's been 10 years now in Vancouver.

APPELT: That's so interesting. And I'm very curious about Death on Facebook, because I know that is a space that is ever evolving. So, it sounds like we've got a little bit of the highlights about your journey to BI. But tell us the rest. What brought you to Behavioral Insights today?

STONE: So, I've honestly been interested in BI. Since undergrad, I remember it being a focus in one of my psychology classes. And I was introduced to some of the BI theories and some researchers. And it just really stuck with me, this idea of human irrationality being predictable once you understood it. I remember sitting in my econ classes thinking, wait, but this is not how people actually act in relation to pricing or something. But my arguments were more anecdotal and full of assumptions from my psych classes.

But then there was this world of behavioral economics or behavioral insights that had these theories backed up with real data. And I think since then, it's just of come up over and over again. It came up in some of my classes in the MBA. It's come up over and over again in my career. Being in market research, I've always been interested in kind of the why behind the whys and what drives people's actions. And I think there's patterns in human behavior that aren't just about opinions and preferences, but really rooted in these cognitive biases or heuristics. So I really wanted to do the professional certificate to deepen that understanding and really be able to speak more of the language of BI.

APPELT: That's really interesting. I can see all of our overlaps dating back years to sitting in econ classrooms and being like, huh! So, you've been working at The Sound for a number of years, and I think The Sound is such an interesting organization. Can you tell us a little bit more about them? Because a lot of folks probably aren't familiar with The Sound and the work they do.

STONE: Sure. So, The Sound is a consumer exploration brand strategy and product innovation agency. It really started as a qualitative market research focused agency and kind of over the years evolved into a full-service consultancy. And we can really help at any point in the process, whether clients doing exploratory research to identify pain points when developing a new product or wanting to evolve their brand positioning to be more culturally relevant or a full-blown quantitative segmentation. Really, we can partner at any point.

And I think what stands out about The Sound is we don't just stop at insights; we translate our research into actionable strategy and recommendations that science can actually implement. So, we're helping solve business problems and guide decision making.

APPELT: That's a good encapsulation and just beg so many more questions. One of the things that I think is most fascinating, having been able to sit in on some of your guest lectures before, is just the diversity of methods The Sound uses. I feel like a lot of practitioners tend to focus on a good reliable set of methods, but they're really just such a small subset, know, things like interviews, surveys, user testing and focus groups. Can you tell us about some of the other methods that The Sound uses and what they offer to The Sound?

STONE: So, we like to say we are method agnostic. We'll use ethnographies, video diaries, social listening, expert interviews, traditional methods, whatever it takes to truly understand people in their cultural context. But in terms of specific qualitative methods that I guess are my favorites that stand out to me. One is digital diaries, which can be text or photo or video based. And I think these are really impactful for two reasons.

One, it lets people respond on their own time, however they're comfortable. So, without the watchful eye of the researcher or the pressure to kind of come up with something, an answer in the moment, I've seen people really open up and share really personal things or tell really detailed stories about something they're passionate about. Like I remember someone doing a video closet tour and showing a piece of clothing and

talking about the memories associated with it. And the other reason is digital diaries allow you to document a behavior or allow people to document a behavior in the moment and tell you about it. So, you could do something like, okay, over the next week, every time you eat a snack. Document it or every time you watch content, document it. And then you can ask questions where are you when you're eating the snack? How are you choosing what to eat? How are you feeling? What's your mood? Who are you with? And that's where you can really see patterns emerge, which is very different from just doing that one time interview.

And then another one that really stands out to me is what we call in situ or in situation. So instead of just going to someone's house, or a facility and doing an interview, we as the researchers are doing an activity with people related to whatever it is that we're studying. So, for example, hiking with them for an outdoor gear brand or grabbing a drink with them for a beer project or riding rideshare with them. And a lot of this involves observation and then asking questions about why they did what they did and kind of having that opportunity to identify pain points and points of joy. And I think this type of research is especially useful for journey mapping because people may miss steps when they're retelling it to you after the fact, or importantly, they may misremember why, why they chose to do something in that moment.

APPELT: Those are such rich data sets. They are such good complement. And I'm just thinking about the amazing wealth of data they provide. How do you go about distilling all of that rich information, if you have video diaries from multiple people or ride-alongs with multiple people that can easily be pages and pages or megabytes and megabytes, how do you distill some of the insights from that?

STONE: Well, in the past, we did it ourselves. Usually the diaries, they're usually pretty quick questions because you can't expect someone to spend hours and hours per day interacting with their digital diary. So, it's usually just you want it to be really quick and easy. So, it just would be like a quick video and where they answer a few questions. And the software we use gives automatic transcriptions. And so, you can quickly read a bunch of videos. But yeah, we have habitually been doing that ourselves and kind of identifying themes. It's also important to watch some of them, I would say, to get that real the emotions associated with it and the facial expressions and all of that.

APPELT: So, part of this is making me think about the intersection that we mentioned. So, market research and BI, I think of them as closely relating, both falling under applied uses of behavioral science. Having worked in one and taken classes and thought a lot about the other, how do you think about that intersection?

STONE: I think they're very complementary and they can often work together. Market research identifies that why behind the why, while BI gives you evidence-based methods to design solutions that actually change behavior. So, I see the intersection as using rich qualitative insights to inform targeted behavioral interventions.

For example, through ethnographies for a fitness app, market research might reveal that people abandon workouts because they feel overwhelmed by choice, they feel guilty when they miss days, and then BI could give you the tools to address those specific barriers, like defaulting to simple 15-minute workouts instead of showing you 50 options or framing missed days as keep your streak alive tomorrow instead of you broke your streak. Without the qual research, you might design solutions for the wrong problem. And without BI frameworks, you might understand the problem but not know how to solve it.

APPELT: That is such a good summation. I love that. That makes me wonder. So, you've completed the BI certificate. Do you now see places where you are already using BI in the work, even if you didn't use that language at the time to describe it?

STONE: Definitely. I think so many instances. One example, I remember a survey told a fast food client that customers wanted more salad options. So, they added them, but then almost nobody bought them. And that's kind of the classic, say, do gap where people answer surveys as their aspirational future selves, but when they're actually standing in line at a fast food place, they're more in an indulgent mindset. They want to treat themselves. So, the context completely changes the decision. And I feel like that we see that so often in our studies, that type of say-do gap.

And another one that comes to mind was a project I worked on around people's relationship with their phones. The client wanted to help people feel more positive about their phone usage. And we had people fill out digital diaries about their daily phone usage. And then we also had an app that they installed on their phone that tracked their real behavior. And then we interviewed them and kind of showed them their real behavior and talked through with them and understood their behaviors and attitudes and feelings around their phone usage. And in our recommendations, we weren't thinking in behavioral. Insight terms, but we were definitely applying a lot of the same principles, thinking about framing and feedback to help thinking about tools to help people have a healthier relationship.

APPELT: Phone usage is a perfect example of the say do gap. How many of us would say, I want to spend more time on my phone every day. That is interesting to hear about some of the ways you've already been using it. What about looking ahead? What are opportunities you see for using BI going forward?

STONE: So, one thing I'm really interested in is how behavioral insights can support organizational change, especially when it comes to adopting new technologies like AI. Right before I went on mat leave, I'm currently on mat leave with my second, I was asked to trial some AI tools and to understand the attitudes and behaviors around AI within our market research industry. And the tools themselves were quite a mixed bag. But what I observed was one of the big barriers wasn't the technology itself, but more human psychology around change in the market research industry, broadly, there's so much talk about it on LinkedIn and in conferences, and there's a lot of fear and resistance. And people are feeling overwhelmed, skeptical, really worried about what AI means for the future of their roles. Or there's also just this simple not wanting to take the time to learn a new way of doing something because people have so much on their plates.

And I think that's something that like every company is dealing with right now. I think about leadership feeling the pressure of not wanting their organization to become obsolete or fall behind, but then facing real resistance from teams when they try to implement new tools. And I think that's a huge area where behavioral insights can make a difference, just thinking again about framing effects, shifting the narrative from AIs replacing us to AIs helping us focus on the creative strategic work we actually enjoy. That's something I've personally experienced with the help of AI tools. But there's just so many things that BI can do, setting tools up. So, trying them is easier than not trying them. Feedback loops, like showing wins, like you've saved 45 minutes using this tool. I mean, of course, you'd have to do the exploratory research element to understand each organization's specific barriers and opportunities. But overall, it feels like an opportunity for BI to shine and help people feel more in control or even excited for these changes rather than at the mercy of them.

APPELT: That's such a good example. And I love that idea of framing because I think if you ask people, like, would you like to have a personal assistant, very few people would say no. But if you ask people, would you want AI to do part of your job, you get a much more mixed bag. And so that idea of like, well, AI can be your personal assistant and like things like that definitely seem like they would make a huge difference in interest and excitement.

STONE: Not like looking at it and not like AI is trying to do your job, but just worse than you can do it, but can just do specific elements that you don't really want to be doing anyway. I just wanted to also say another area in terms of using BI in the future that I'm really interested in. I'm just passionate about how BI can support healthier relationships with technology, kind of like that project I was talking about that I was involved in, especially when I think about young people.

Some of the stories that I heard during my interviews for that relationship with your phone project were really difficult to hear. I remember them making me cry, teenagers ruining their grades and relationships because they were so addicted. And as a parent now, I think about this constantly, you how do we help kids grow up with agency and emotional regulation in this digital world that's designed for distraction? And whether it's through how we design tech, whether it's through regulations or even parenting tools, I think there's a huge opportunity for BI there as well to shape more intentional human-centered tech habits.

APPELT: It's a great point about this opportunity where there's a lot of innovation, but it's often led by the technology rather than by the human side of it. And so, that seems like a very rich area. And like you said, would ease adoption, but also potentially leads to these very human outcomes of being happier and more satisfied with work and more connected. So, I think that's a really exciting area and also gives a bit of a hopeful spin on what is sometimes seen as doom and gloom. I love that.

STONE: I think we could use some of that in the tech world right now.

APPELT: Absolutely. So, we've talked a bit about ways you've used BI, ways you want to use BI. I'm curious, when you think back to your time in the program over the past year, beyond some of the things we've already talked about, are there particular BI concepts or skills that have really stayed with you?

STONE: So overall, I think what really is going to stay with me is a more general answer to your question. Just how BI makes me think about human behavior differently. Think BI makes you think about the situation versus the person in a stronger way. And I think it's really hit home for me. I think I was thinking about this already, but actually doing the course has really underlined it for me. You think about things like defaults and social norms and constructed preferences and how they move behavior more reliably than willpower and how much of what looks like personality is actually context. So it may be, in fact, easier than we think to, quote unquote, change people, not by changing core beliefs or values or attitudes, but simply by changing situations.

And I think that's quite profound because the changing people part is quite difficult and almost demotivating. You always hear, don't date someone you think you're going to change, but it's especially demotivating when you think about big issues, all the issues we're facing in the world right now like climate change or racism. And when you boil it down to individual behaviors within individual situations, suddenly behavior change for the better feels a lot more achievable. And I think that's the beauty of BI.

APPELT: That is so well said. I love that. And I think I feel that as well. And I like the idea of there's so many levers to play. Like, certainly, sometimes there is like a personal attitude or belief shift that's needed. And sometimes there's system change. But having the behavior and the situation as a lever and realizing the power of that, and then also how it interrelates with those other pieces, it does feel like a more welcoming and easier entry point than like, okay, I'm going to dismantle the system myself. But maybe we can change this small situation we're facing.

STONE: And maybe in changing those small situations, it can actually lead to the deeper attitude or belief change over time. But I do think that that's definitely part of it. But it's a lot harder to ask. And so maybe it can happen together.

APPELT: Absolutely. Any other program reflections or highlights or challenges to share?

STONE: One highlight was definitely just the classes themselves and getting exposure to so many awesome professors. And I think the other one for me was how applied the program was. So, we weren't just learning theory, we were living it by doing our capstone project and actually taking those skills to the real world. And I do have to say another highlight for me was the amazing team I worked with because you do spend a lot of time together. Shout out to Courtney, Saidu, and James. I really loved working with my team and I miss our weekly check-ins.

APPELT: That's amazing. It is funny how at the time you're like, another meeting and then you're like, I miss having those meetings.

STONE: In terms of challenges, my biggest piece of advice is to make sure to get everything in writing, meeting each agreed upon step with your client team. We ran into a challenge when there were staff changes within our client team and we had a new decision maker halfway through our project. And we had been very friendly and casual with the previous team and some decisions were made in meetings or in like teams chats and ended up having to make significant changes to our research design and get approval on our project all over again in the like, nth hour. So, it all worked out, but it caused a lot of stress and for our advisor too and probably you too. So yeah.

APPELT: There might have been some phone calls going on behind the scenes of various people trying to rescue things. That's very good advice. And I think it speaks to all BI projects where you're working with partner organizations. And it's really helpful to have that paper trail, both to make sure you're on the same page, but also to kind of proof it against those changes in the team. Because it's very common for there to be turnover at either the project analyst who's on the project with you or the senior executive who offers approval.

And so, I think that is really important advice. Well, I also, as you know, from having listened to the podcast before, ask our guests for a message for folks who are new to the field. So, whether they're folks who are in the certificate program or just folks who are in the space, what advice or message do you have for people in the field?

STONE: For anyone starting in BI, I'd say you know, you're not just learning techniques and tools, you're learning to see problems differently and implement a human-centered approach to solving them. And you're

entering a field where the skills you're learning couldn't be more relevant and uniquely positioned to help us navigate some of today's biggest challenges. And I really expect this field to grow exponentially in the near future. So, I think doing the professional certificate is a great career move. There's my little pitch there. Seriously, I do see, you know, with like with AI and all the stuff I was talking about earlier, I just see so much opportunity for BI in today's tech world and political climate and all of that. So, it's just a really exciting place to be.

APPELT: Obviously, I'm hugely biased, but I think it's just such an important lens to bring to the world, like you were saying, just even if you just realize the power of the situation in your day-to-day life, that's already, it makes a huge difference in how you navigate the world. So, I will echo that. Well, this has just been jamming packed. I feel like we just firing away on all cylinders with so many good insights. So, thank you for joining. It was lovely to have you in the program last year. It's lovely to chat with you today. And I'm excited to see how you use BI now that you've got this other set of tools in your set. And just thank you for always answering the call, whether it's to a guest lecture or be a guest on a podcast or anything else. Thank you.

STONE: Thank you. I really enjoy it. And I'm so glad I, as you know, I was kind of interested in doing the program for a few years there. And I'm so glad it finally happened. And I was obviously excited about it going in, but it was better than I ever thought it could be. So, thank you for the program.

APPELT: Aw, well thank you so much. Thank you. And thanks to our listeners for joining another episode of Calling DIBS.

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