



## Episode 109: "Putting BI to Work"

*with Alison Schatz, Senior Communications Specialist at Metro Vancouver*

*After completing the Advanced Professional Certificate in Behavioural Insights, Alison Schatz is finding a wide range of ways to weave BI into her work. Among other uses, Alison is drawing on BI concepts and methods to write action-focused communications, to coordinate with colleagues, to connect with difference audiences, and to lay the groundwork for herself and others to do full BI experiments to improve services and sustainability for the community.*

*Transcript:*

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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 Alison Schatz. Alison is Senior Communication Specialist at Metro Vancouver. We were fortunate to have her in our most recent cohort in the Advanced Professional Certificate in BI. Alison's a really clear, thoughtful communicator, and she has really great ideas about how to use BI and That's only in a few months post-graduation.

I'm really excited to hear what she's already thinking about, what's ahead, and just generally chatting today. So welcome, Alison.

ALISON SCHATZ, GUEST: Thank you. Hello.

APPELT: Thanks for being here. Can you tell us a little bit about yourself?

SCHATZ: Yeah. I work at Metro Vancouver Regional District, which is the regional utility that serves 23 cities. Vancouver, Surrey, Burnaby and the surrounding areas. And we provide drinking water, liquid waste management, solid waste management and a number of other services that make the region more livable. So my role on the communications team or part of my role is to work on communications and campaigns that influence behavior to support these service areas. So for me, that mostly looks like working on campaigns to reduce waste or increase recycling. As well as conserve water.

APPELT: That's so interesting. When I first moved here, people would say Metro Vancouver, and I thought it was just a colloquialism. Didn't realize it was an actual entity. So it's really fascinating to have gotten to know you and some of your colleagues and the great work that you do. I can only imagine how challenging it is to coordinate all of that across jurisdictions. So I'm curious. I can see that there might be some behavior in there. What brought you to the world of BI?

SCHATZ: I was so excited when I learned about BI because I thought this is the place for me to learn and grow. I did my undergraduate studies in biology and was really excited about sustainability and loved the critical thinking aspect of that. And then I worked in biotechnology on the comms team at a biotech company in Vancouver. Then I went to business school and ended up in advertising and there I had some clients focused on behavior change seatbelt usage and Metro Vancouver was one of my clients.

So it all came together for me when I started working at Metro Vancouver, which has these goals focused on sustainability. And I was able to use my communication skills to work towards these sustainable goals of reducing waste and really do work that's aligned with my values. So I've previously mostly used the social marketing approach, which uses marketing principles to shift behavior. Working with the many teams that I do, I can see opportunities to shift behavior beyond just using communications. So learning about BI and how this tool works and making evidence-based trials and recommendations is a perfect way for me to grow.

APPELT: Yeah, I can see how that makes sense. And I love this from biology to business. It's kind of like, a little bit of this pendulum from science to business and then now back in between and something that overlaps. So I can see how you ended up here, which is really neat. I'm curious, working in local governments, do you see potential for full BI projects, whether those are experiments or quasi experiments? What do you see?

SCHATZ: Yes, I'm very excited about all the potential I see. I mentioned some of our service areas. I'm drinking water, I'm in liquid waste management, solid waste management. And we deliver these in collaboration across the 23 regions. Because of this structure and all these services, Metro Vancouver has a lot of touch points through developing policies, communicating with members, signage, communicating with the general public.

And while my lane is technically communications, having done the BI certificate really positions me well to get other teams excited about using the tools available to us to change behavior in an evidence-based way. Bring that rigor to it, which urges a lot of engineers and they're very excited about the evidence based approach as well. So it's nice common ground for us.

APPELT: Oh, that's really interesting. So I know that experiments can be tricky and also of course, always take a long lead up. So I know you've only finished the certificate, you know, seven months ago or whatever it is now. So you probably don't have a full packet of experiments to talk about, but beyond experiments, are you seeing other opportunities to weave BI into your work more immediately? And can you share any examples?

SCHATZ: Yes. So I think BI dovetails really well with behavior change communications or social marketing. I'm definitely hoping to do full BI projects in the future, but building it into my projects for now. I have a couple of really tangible examples of how I used it in behavior change campaigns recently. Um, one is with our recent single use item reduction campaign. We wanted employees to share photos of them using their reusable mug or container at their work site.

But we've appealed to employees to share photos of themselves and their work in the past. And usually nobody responds. If I do a story on the internet, I'll get zero or one responses because it's, you know, previously framed as like, I share your photos, this is so great for you. This time around following the BI course, I reframed it, the request as, can you help corporate communications? This team needs your help to do their job. And just by reframing that ask, I got about a dozen responses. So even though it wasn't a huge

amount, it went from zero to not zero. And just from a simple reframe of the headline and how I asked for that help.

APPELT: The cool thing about anytime something increases from zero is technically it's an infinite increase.

SCHATZ: I had so many photos. I was so rich with content.

APPELT: That's awesome.

SCHATZ: Yeah. Another way I did it is we were rolling out these returnable cups or reusable cups in the cafeteria in our building and had an internal communications plan to communicate that to employees. The messaging in the plan was focused on biggest barrier, which is going to be the convenience to return the cup, but I knew there was a lot of opinions and noise about what we should, other people thought we should be saying.

So in my communication strategy, the top of the frame, top of the document, I used the EAST framework and put a bullet beside each one about how I was going to make it easy, attractive, social and timely. And then senior really resonated with senior management and they said, oh, this plan really, I really understand why you're doing what you're doing because of how you use the EAST framework in the plan.

APPELT: It's almost meta in a way, know, doing the up upstream before you actually get to it. Neat. That makes sense. Lots of opportunities to use BI and behavior change communications. Are you also using it in your day to day work beyond that?

SCHATZ: Yes, I think BI is such a good fit for process and productivity. The nature of my role is that I'm often asking people who don't report to me to do things. And I also I to manage work through a lot of teams and manage approval processes. So there's a lot of communicating that happens. And I'm regularly asking myself just how could I make this easier for people? I'm trying to walk the walk.

So things like using bulleted lists and simplifying my emails and just thinking about how I'm making requests to people, as well as when I'm setting up a meeting, if I need people to review something or prepare something. How can I put those prompts within the meeting invite and get that done? So always thinking about how I can make it easier and more attractive for people so I can move my work forward.

APPELT: Yeah, I love that because I think that's one of the things we often overlook because when we're first learning about BI or we're trying to apply it in a new situation, we try to go for the big snazzy jazzy thing, but sometimes just doing it in your day-to-day work really simplifies and makes things easier and then frees up bandwidth to later do. Some of the bigger snazzy or jazzy or things.

SCHATZ: Yeah.

APPELT: So you've talked about using it in behavior change communications and kind of just your day to day communications. Are you also using it incorporate communications at all?

SCHATZ: Yes, my capstone project, the touchpoints ended up using word email on a web page and we tested framing and simplification and ended up seeing slightly significant result between the two conditions. So that

really gave me the impetus to focus on that and make sure I am being diligent about making the communications as simple as possible or thinking about how to frame them for the correct audience and just taking that extra time. So I have been applying those insights across all the work I do.

APPELT: Yeah, I think it's really interesting your point about tailoring it to the audience. I think often with corporate comms, we try to think of like, how to make it appeal to the most folks. And then sometimes we leave aside the idea that actually maybe the general needs to be modified for the different audiences. So I love that you're weaving that in.

SCHATZ: Yeah, I think studying BI has made me better at writing call to action statements or better at asking people to do what I them to do.

APPELT: Yeah, think the call to action was for me, it's one of those simple ones where you just forget it when you're in the heat of the moment. You're like, well, it's going to be clear on page seven what I want them to do. And then you're like, wait a minute, maybe that should be on page one. Beyond these, I mean, these are already so many ideas. But any anything else like BI for research or anything like that?

SCHATZ: Yeah. Recently, I was talking to a colleague, she had an online dashboard that she needed to assess. How the webpage was performing. And it was a pretty specific audience and she really wasn't sure how to get the data she needed. So as we were talking about it, I actually pulled out my slide deck of my notes from the exploratory research course, and we walked through the different options for how she could get the data she needs. Talked about, know, interviews or observation, you know, getting people to narrate it as they're doing it, what they're experiencing. And so from there, she was able to kind of craft a better research brief and then get the data she needed.

APPELT: It's like you're becoming a little internal consulting agency.

SCHATZ: Yeah, I mean, it's good. We do so much research in our work anyways, but it's easy for me, I find, to get stuck in the same couple methods over and over again. So having this other resources to think creatively about how I could get the data maybe in a more cost effective way or a bit from different perspective.

APPELT: Anything else that comes to mind in terms of uses? Anything else you're seeing or you're hearing about?

SCHATZ: Yeah, I thought this was such an interesting question about how to use BI besides a big BI experiment. So I asked the other members of my capstone team. One of them, he works in the very analytics and data focused role. And he said that he's observed that his team has a lot of excessively long forms, which were his words, and is mentioned using BI to improve them.

Another example he shared, which I love, was that his team has started using a project management tool, MS Planners, and someone set up an automated message that sends a congratulations message to the whole team every time a task is completed, which I love that. Think that'd be so motivating.

Then my other capstone team member, is a project manager and she told me about how she uses BI in change management. So when people are avoiding a change, she'll reflect on why someone might not be adopting the

change from the perspective of BI now that she's done the certificate program. So she shared that bell curve, that's the stages of technology adoption. And now what she does is she doesn't look at early doctors or skeptics, but really the middle majority. And she's had good success using BI there.

APPELT: That's really neat. Yeah, I've been having lots of cool conversations about BI and change management. And I think that's such an exciting overlap. I'm excited to see how people push that forward.

SCHATZ: Seems like a really rich area.

APPELT: Yeah. Well, lots of opportunities. There's probably also challenges. Are you seeing challenges? And if so, how do you overcome them?

SCHATZ: Yeah. So at Metro Vancouver, I'm very excited about BI. A couple of my colleagues are, but the reality is it's new and people have limited resources and capacities. So it's going to take a bit of work before we can get some big projects in the move forward. But like you just said, we can walk the walk and do it in smaller ways until then.

The other way that I'm kind of overcoming that interest in resources example is sharing relevant examples. Which was suggested in the BI101, how to do BI101. So recently I was sharing them with the Solid BASE Management team and I pulled sources from BIT in the UK and BCBIG and seeing both the relevant subject area as well as similar organizations in the similar geographic region really helped make it relevant and interesting to the senior management.

The other thing I'm trying to do is highlight benefits of using BI in a way that's relevant to them. So for the engineers, really focused on the evidence-based findings. Whether it changes behavior or not, we would know conclusively what the intervention did. And that's something that really resonated with them.

APPELT: That's really neat. And I like the idea of how at this point, we're in this really privileged position in BI that there are so many examples across jurisdictions and across different types of problems. So you can actually pull, you might think like, oh, no one has been working in this space, but a lot of times there have. And so you can pull a really relevant example and get people excited.

SCHATZ: And that's so great about the Wiki that you and the team have created. It's such an incredible resource to find project examples there.

APPELT: That's the hope. So anything we can do to help make it easier to search is great. I'm curious what advice you have for others who are looking for opportunities to use BI in their work.

SCHATZ: What I wrote down is I'm going to use BI to get people excited about BI. So do it in small ways and let people know what I'm doing to pique their interest and their curiosity.

APPELT: So looking ahead, are there any ways you hope to be using BI going forward?

SCHATZ: Yeah, I'm just so excited about this field because it blends, you know, creativity and strategy and data, which kind of going back to my background of biology and business, it feels like such a great fit. I'm really hoping to use it to move the needle on some of the projects I work on around waste reduction, encouraging

recycling and preventing waste and maybe encouraging reuse are some of the big topics that we're exploring here.

APPELT: Exciting. Lots of hairy problems that maybe we can move the needle on. Well, so you finished the program in the late spring and now we're in the winter. So thinking back, are there any particular concepts or skills that have stayed with you? Or is it all a blur?

SCHATZ: It is all a blur in terms of particular concepts or skills. I think where I feel I've learned the most kind of tactical skills is in the innovation phase and the courses of like, here's what people have tried and here's what's worked. And then also in the data analysis, I really appreciated how you broke down and explained the steps and analysis and the decision tree of which test to use when I feel much more confident in those areas now.

APPELT: Any other program reflections, highlights, challenges, any thoughts?

SCHATZ: I mean, the highlight for me was definitely meeting and working with smart, curious, interesting people. Was such a great experience. I just really feel more confident in the skills that I've learned, but also the skills I already had around research and strategy and now having kind of the methodology and resources and community to support me behind those.

APPELT: I've said this before, but I really love how there's so many smart, curious people in the program and that because it's mostly working professionals, people tend to bring in their previous backgrounds, whether it's biology in your case or folks who are in the creative industries or business also in your case. Since you have so many backgrounds.

SCHATZ: Yeah. We had a nurse on my capstone team.

APPELT: Yeah, and just, yeah, so many different ideas coming together and I think it just makes it so much richer. Any advice for folks who are considering or beginning the program?

SCHATZ: I think if you're considering the program, you should go for it. And as we've been talking about today, even if, you know, changing these behaviors or these big problems isn't exactly your job, there's just so many ways to use the methodology and the skills that use in the BI program, like me and my communications or my colleagues who work in analytics or project management.

APPELT: That's such a kind answer. Thank you for supporting the program like that and I'm so glad you had a good enough experience that you want to recommend it to others. I appreciate that. Kind of on a similar note, do you have a message for our BI practitioners in training?

SCHATZ: Yes, I think for practitioners in training who are currently in the program, you should get yourself a little treat every time you finish the readings because you deserve it. And just, I guess more broadly, I'm just really excited to continue to be part of this community and learn my skills and learn more about the field.

APPELT: Awesome. I love that enthusiasm and also nudging people to take a moment to celebrate the progress made because it really makes it go by more pleasantly. I'm really excited about all the opportunities at Metro Vancouver I think there's just so much there where you can have an impact on people's lives, which

is really exciting. So it's really neat that local government is so on the front lines of helping people in communities. And that usually has a pretty large behavioral component. So it just feels like a really exciting generative area. And I'm excited you're working in that focus.

SCHATZ: Oh, great. Thank you. Me too.

APPELT: And just thank you more generally for being so generous with your time and your insights and your enthusiasm and chatting with us today on the podcast.

SCHATZ: Pleasure.

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

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