

# From *Inside Nudging: The Excerpts*

## Appendix A: Ideas to Introduce Behavioral Science Initiatives

I wrote *Inside Nudging* to provide managers with a more detailed look at different perspectives related to behavioral science and its application in business. In this appendix<sup>1</sup>, I provide both some ideas for introducing behavioral science initiatives and some jump-start things to think about.

First, a company needs to identify its goals and identify what type of *predominant organization model* it wants to pursue. If I were to make an analogy with food, think of the organization model as your main dish.

Second, a company should consider a number of *implementation elements* that may play a role during execution. Getting back to the food analogy, think of these elements as possible spices or options that you can (or sometimes should) add to your main dish.

### ***Predominant Organization Model***

At a high-level, I've seen five predominant organization models that companies use to implement behavioral science. These are:

1. Innovation Center (focuses on broad integration into the business)
2. Thought Leadership Center (focuses on marketing and branding)
3. Internal Consulting Office (focuses on completing specific operational assignments)
4. Working Group / Steering Committee (focuses on developing cadence)
5. Ad-Hoc (informal or departmental use)

More details below, including some things to jump-start your thinking.

<b>Predominant organization model</b>	<b>What it is</b>	<b>Things to think about</b>
1. Innovation Center	An organization dedicated to creating, co-creating, or reinventing products, services, tools, and content	<ul style="list-style-type: none"><li>• Identify your goals, and consider a holistic view.</li><li>• Consider how research, innovation, and testing will work in concert.</li><li>• Develop a vision, strategy, and multi-year plan.</li></ul>
2. Thought Leadership Center	An organization primarily dedicated to creating or co-creating content and channels for discussion (e.g., newsletters, whitepapers, media, forums)	<ul style="list-style-type: none"><li>• Identify your goals, especially relative to marketing and branding.</li><li>• While research may not need to be as extensive as with an Innovation Center, consider what level of differentiation is desired.</li><li>• Develop research, content development, and</li></ul>

<sup>1</sup> Special thanks to Namika Sagara (Behavioral Scientist and President, Sagara Consulting LLC at [www.sagaraconsulting.com](http://www.sagaraconsulting.com)) and Suzanne Shu (Professor, UCLA Anderson School of Management at [www.anderson.ucla.edu](http://www.anderson.ucla.edu)) for providing input and commenting on this appendix.

		fact-checking capabilities that are appropriate to the approach.
3. Internal Consulting Office	One or more resources that can provide support within the organization for behavioral science assignments	<ul style="list-style-type: none"> <li>• Consider the goals of the Office with a particular eye toward the business case and realistic capacity of the Office.</li> <li>• Determine what resources the Office will provide versus the operating groups (with an eye toward research, innovation, and testing processes).</li> </ul>
4. Working Group / Steering Committee	A group that meets regularly to identify goals, areas of interest related to behavioral science, areas to review, and actions to take	<ul style="list-style-type: none"> <li>• Identify both business and science leader roles to establish the right alignment, priorities, and cadence for the group.</li> <li>• Potentially consider contracting with external resources to fill gaps on either an interim or more permanent basis.</li> </ul>
5. Ad Hoc	A situation where resources are spread out within an organization, such as in isolated pockets between different departments	<ul style="list-style-type: none"> <li>• While ad hoc efforts can be both valuable and comfortable for an organization, consider investigating whether opportunities are being missed and whether actions should be taken.</li> </ul>

### ***Implementation Elements***

Organizations use implementation elements to help strengthen their overall approach. There are at least eight key ones that I've run into:

- Advisory Board or Panel
- Science Bureau
- Behavioral Science Officer or Leader
- Testing Platform
- Blue Sky / Potential Initiatives
- Pilot Project
- Behavioral Audit
- Education Program

The sensibility of combining certain elements with specific organization models varies. For example, an advisory board and testing platform may be highly desirable for an Innovation Center, but these may be less desirable for a company choosing an Ad Hoc approach to behavioral science. Again, I include more details below, plus some things to jump-start your thinking.

<b>Implementation elements</b>	<b>What it is</b>	<b>Things to think about</b>
Advisory Board or Panel	Multiple, named experts that can provide broad and deep academic science, industry,	<ul style="list-style-type: none"> <li>• Identify your organization's gaps in knowledge of behavioral science and the market.</li> <li>• Determine to what extent you can offer value</li> </ul>

	and customer input from ideation through implementation	to advisors (e.g., data for research, compensation, intangibles). <ul style="list-style-type: none"> <li>• Develop formal documents covering purpose, structure, compensation, and other requirements.</li> </ul>
Science Bureau	A somewhat loosely organized set of available experts (like a bullpen) that can provide academic support, generally in the form of talks or content	<ul style="list-style-type: none"> <li>• Identify potential themes, venues, and experts to support the goals of your effort.</li> <li>• Given uncertainties associated with loosely organized efforts, think through potential upsides and downsides.</li> </ul>
Behavioral Science Officer or Leader	A point person that provides vision and steering for scientific activities within the organization	<ul style="list-style-type: none"> <li>• Identify a leader or potential person that can grow into the role.</li> <li>• Consider to what extent internal- or external-facing activities are expected.</li> <li>• Provide the leader with both enough room to operate and resources.</li> </ul>
Testing Platform	Processes and capabilities to both A/B test (e.g., in the lab or field) and analyze results through statistical analysis	<ul style="list-style-type: none"> <li>• If behavioral science efforts are to impact products or services, then testing capabilities need to be developed.</li> <li>• Testing capabilities will need to account for research, review board, test design, execution capabilities, participant recruitment, and analysis resources.</li> </ul>
Blue Sky / Potential Initiatives	A clean slate that reflects a rethinking of what behavioral science possibilities an organization might pursue if resources were available	<ul style="list-style-type: none"> <li>• Diversity and process are keys to blue sky thinking, so consider how ideas will be generated and the context (e.g., players, venues).</li> <li>• Figure out processes for elaborating on initiatives, developing thumbnail business cases, assessing complexity, prioritizing, allocating resources, etc.</li> </ul>
Pilot Project	An effort to get started, test the market, and see the possibilities of executing future projects, recognizing that the organization is early in the learning curve	<ul style="list-style-type: none"> <li>• While a strong project management discipline is required for a pilot, don't lose sight of any larger problem statements the organization may be trying to address (e.g., increasing know-how, strengthening innovation capability).</li> <li>• If a longer-term plan has not been developed, try to do so before the pilot ends.</li> </ul>
Behavioral Audit	A behavioral science assessment of specific business elements, which may include products, services, communications, materials, websites, systems, and processes.	<ul style="list-style-type: none"> <li>• The scope and depth of an audit is flexible, so revisit the problem statement that the business wants to address, and align the scope of the audit with the resources available.</li> <li>• Generally behavioral audits should be conducted by behavioral science experts or people that have been trained.</li> </ul>

Education Program	Materials, seminars, workshops, and courses on behavioral science and related topics	<ul style="list-style-type: none"><li>• Education programs may need to be tied in with other activities (e.g., product development, marketing, business development) in order to stick.</li></ul>
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