

Asking the right questions: 5 Types of questions

To align with your client's concept you need to become skilled in the five types of questions and identify appropriate uses for them in client encounters:

Confirmation Questions validate your data or reveal inaccuracies in your current thinking.

1. Will the Audit Committee still hold you accountable for completing audit plan?
2. Will you continue to do periodic reviews after the initial implementation and review?
3. Does the cost-cutting initiative remain your company's #1 priority?
4. Last time we spoke you were going to back-fill with 2½ FTEs. Is that still the case?
5. Last time we met, our rate per hour was in the middle of your expected range. Is that still the case?

New Information Questions help you clarify your client's concept and the business results they desire.

1. How do you know that...(turnover is high, productivity is low, risks are not being well managed, etc.)?
2. We had planned to cover the following areas...what parts would be most valuable for us to emphasize and spend time on?
3. Can you restate, in your own words, what you hope to gain from successful completion of this program?
4. What's the most valuable way for us to spend this time together?
5. Can you tell me more about your need for _____?(better risk management, a new auditor, cost-cutting, IT effectiveness, etc.)?

Attitude Questions identify your client's personal needs, values, and attitudes.

1. How is your organization reacting to _____ (a recent, important development in this client's industry or function)?

2. In talking to my clients in your industry, I'm struck by a couple of particular issues that they are consistently grappling with. These include X, Y and Z. I'm curious: how would these resonate with you and your management?

3. What do you like most about the approach we've outlined?
4. I know it's still early, but from your perspective, how do you feel it's going? Has the start-up of this work met your expectations?
5. Do you feel we're building the right set of relationships in the organization? How could we improve in this area?

Basic Issues Questions help identify client concerns that could derail an effort to move forward with them.

1. What aspects concern you?
2. Before I answer, can I ask if you have any particular concerns right now about the team/this individual?
3. What are your hesitations about implementing a possible change?
4. What are your concerns with the current proposal?
5. I sense some hesitation on your part to bring Finance into this discussion. Is there something I can do to help resolve this?

Commitment Questions help you determine where you stand with the client by identifying their willingness to take action to move things forward.

1. Do you plan to approve this project, When can I expect to get formal approval from you so that we can begin to pull the staff together for a kickoff meeting?
2. Are you available to discuss this further on Thursday at 10 a.m.?
3. Can we meet with Jim next Friday to discuss the time lines and resource commitments from his team for this project?
4. Are we in agreement that the next logical step is for you to setup a meeting with the CFO

Asking the right questions: Questions and listening

Questions

Using questions effectively determines the quality of the information you gather. The questions you use during an interview act much like a funnel. You start an interview gathering general information about a subject and, based upon the answer, you may probe and gather more specific information about a topic. As you gain more information, you move down the funnel.

Open Questions

At the top of the funnel are open questions. They allow you to gather broad information about a topic. These types of questions:

- ▶ Usually require an extensive response
- ▶ Often begin with How? What? Why? Can you tell me about?

Probing/focused questions

A good interview is based on a very simple rule which, sadly, is often ignored.

- ▶ Ask one question at a time
- ▶ Stop! Listen to the answer
- ▶ Base your next question on what you have just heard

A probing/focused question is a response to the answer just given. Use them to investigate further and to dig deeper into a topic. Remember to ask a probing question based on what the person actually said, and not what you expected them to say. These types of questions often ask why, who, when, where, what else?

Hypothetical questions

Hypothetical questions can be useful in problem solving. These offer a non-judgmental and non-threatening way to invite the other person to share more information. Eg, 'If you were able to start again what would you do differently?' Or 'If the budget constraints were removed what would you make your top priority?'

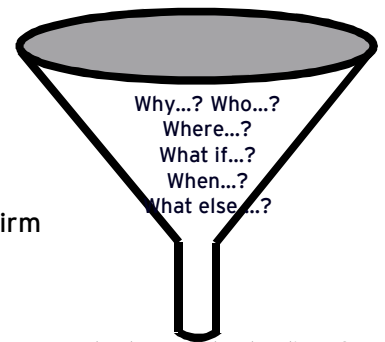
Reflective questions

Further down the funnel are reflective questions. These allow you to check your understanding of the information you have learned. Eg, you might say to a client, "If I've understood you correctly your main priorities are x and y. Is that right? In response, they may either say yes, confirming our thoughts, or say no, and add more useful information that will take you back up to the top of the funnel to probe further. A 'no' is just as useful a response as a 'yes' as it gives you the opportunity to ask further questions.

Closed questions

Closed questions can be answered with one word, often a 'yes' or a 'no'. They are very useful to confirm your understanding, and are often used to finish a reflective statement as in the example above. They are not useful for gathering information.

- ▶ Open questions
- ▶ Probing questions
- ▶ Hypothetical questions
- ▶ Reflective questions
- ▶ Closed questions to confirm



Common mistakes to avoid

Here are some things to avoid when conducting an interview. It's not just asking the right question. It's about asking the question right.

Multiple questions

A common mistake is to ask more than one question at a time. Often this is driven by a desire to clarify. However, multiple questions are confusing and hard to remember. They lead the client to the type of answer they think you are expecting. They give the client a chance to avoid a question they would rather not answer.

Forced choice questions

These questions force an answer from a list of given possibilities. These are not useful to gather free form information eg, "Do you want x or y?" Neither, I want z!" However, they can be used where there is a genuine choice between limited options ie only x and y are available.

Leading questions

These invite the answer the questioner wants or expects to hear. This can prevent free responses and may seem manipulative. Do not focus on your next question.

Active Listening

1. Face the speaker
2. Maintain eye contact
3. Note body language
4. Minimize external distractions
5. Respond appropriately
6. Focus solely on what the speaker is saying
7. Keep an open mind.
8. Engage yourself.

Creating an agenda

When creating an agenda, consider the following:

An agenda has three sections:

- ▶ Open
- ▶ Meeting content
- ▶ Close

The sections may include the following considerations:

Agenda Open

Objectives

- ▶ State the objectives of a meeting clearly
 - Validate that the purpose and objectives of the meeting are clear when preparing the meeting agenda with the meeting owner. This will help you to identify the attendees needed to reach that objective. You may not need all of the attendees all the time.
 - Make sure the agenda helps you meet your objectives for the meeting. Good objectives help you determine if you have the correct flow and timing. You should not try to accomplish too much during these meetings as it will frustrate the attendees.
 - Usually the agenda and the objective should be given to the attendees prior to the meeting (as a pre read) so they know the purpose of the meeting.

Capture expectations when appropriate

- ▶ This section gives attendees the opportunity to say what they hope to get out of the meetings and allows the facilitator to either work with expectations into the meeting or rearrange and change the agenda if appropriate.
- ▶ This section allows you to manage expectations for the some if someone brings up appointment and will not be covered, we can let them know the cover letter.
- ▶ **Note:** some people do not like this, as they think it's too obvious. When this happens, explain the benefit of capturing expectations or move on to the next item. This is often a normal sign of resistance as they may not be used to working this way.

Review actions from previous meeting

- ▶ This make sure the that actions are reviewed in progress is shared. It is also a powerful way to give ownership to make sure attendees have done what they said they would.

Meeting Contents

- ▶ This section contains the meeting's discussion points in order.
- ▶ You may also consider assigning the time to each topic. This will help you use the meeting time appropriately in a relationship to the relative importance of each agenda topic. It's also the check if you're moving through the meeting at the right pace to address all the topics.

Agenda Close

Review meeting participants expectations (where appropriate)

- ▶ This make sure the that actions are reviewed in progress is shared. It is also a powerful way to give ownership to make sure attendees This allows attendees to see where you've addressed their expectations during the meeting (positive) and also allows you to put next steps in place to cover those that were not met.
- ▶ This lets participants know that they're being listened to it and involved.

Next steps

At the end of the meeting quickly go through the next steps captured during the meeting and confirm thath the members of the team have signed up for each step and agree to a deadline for completion.

- ▶ This allows the attendees to see the actions arising from the meeting.
- ▶ It also check to see that there is not too much reliance on one participant . Teams should spread the load where possible.
- ▶ The next step should also include the action to be taken, who will do it and by when.
- ▶ Than the client/attendees.
- ▶ Close