

Qualitative Questioning



Updated 2017

Understanding Goals

- **Tell me:**
 - **What are some obstacles you encountered in budget analysis**

- **Tell me:**
 - **For those that had success with finding budget efficiencies, how did you find it?**



Look at the List

- **What are real obstacles to finding budget efficiencies or opportunities for reduction?**
- **What are perceived?**



Look at the List

- **Recipes for success:**
 - **Defensible**
 - **Logical**
 - **Repeatable**
 - **Validated**



Budget opportunities

- **Analysis that critiques agency and program expenditures.**
- **today we'll focus on qualitative.**
- **tomorrow we'll cover quantitative techniques.**



Learning outcomes

- **Understand qualitative discussion tools**
- **Utilize question techniques**
- **Stop fishing start focusing**



Qualitative Discussion – the trick is to listen

- **Don't interrupt and don't impose your "solutions" or judgments**
 - **Interrupting sends a variety of messages. It says:**
 - **I'm more important than you are**
 - **What I have to say is more interesting, accurate or relevant**
 - **I don't really care what you think**
 - **I don't have time for your perspective**
 - **This isn't a conversation, it's a contest. I win.**



Qualitative Discussion – the trick is to listen

- **Wait for the speaker to pause before asking clarifying or probing questions.**
- **Rather than interrupt, let the speaker finish their thought. Then recircle**



Qualitative Discussion – the trick is to listen

- **Ask questions only to ensure understanding.**
- **Your question can lead the discussion out of focus**
- **Let's try it! Listen and Draw activity.**



Qualitative Discussion – question techniques

- **Open and Closed Questions**
- **Example of Closed:**
 - **Are you thirsty?**
- **Example of Open:**
 - **How can I make you more comfortable?**



Qualitative Discussion – question techniques

- **Appropriate times for open questions:**
 - **Exploratory conversation**
 - **Finding out more detail**
 - **Finding out a perception or position**
- **What else?**



Qualitative Discussion – question techniques

- **Appropriate times for closed questions:**
 - **Testing your understanding or the other person's**
 - **Concluding a discussion or making a decision**
 - **Frame/reference setting**
- **Submit examples**



Qualitative Discussion – question techniques

- **Funnel Questions**

- **Example:**

- How many people currently support that operation?
- *Ten.*
- Are they technical or policy?
- *Technical.*
- What is the timeline for completion by the technical team?
- *Next quarter.*
- Once the programming is finished in the next quarter, will there be any personnel reductions?
- *Yes, we anticipate some reductions.*
- Can you provide the scaling down of the operation and the anticipated personnel reductions that will be related to the completion of this project?



Qualitative Discussion – question techniques

- **Appropriate times for funnel questions:**
 - **Finding more detail about a specific point**
 - **Gaining interest or increasing confidence of the understanding on the subject matter**



Qualitative Discussion – question techniques

- **Probing questions**

- **Example:**
 - **How do you know that the new database can't be used by the sales force?**



Qualitative Discussion – question techniques

- **Appropriate times for probing questions:**
 - **Gaining clarification to ensure you have the context and understand it thoroughly**
 - **Drawing information out of people who are trying to avoid telling you something**



Qualitative Discussion – question techniques

- **Leading questions**
- **Example:**
 - **How late do you think that the project will deliver?**



Qualitative Discussion – question techniques

- **Appropriate times for leading questions:**
 - **As a strategy to have the agency produce information on a topic.**
 - **i.e. “The agency will save at least \$1 million as a result of the new technology rollout, correct?”**
 - **Trying to affirm your understanding**
 - **i.e. “So payments will be processed by September 1st?”**



Qualitative Discussion – question techniques

- **Ask questions to:**
 - **Learn – open, closed and probing**
 - **Build – open**
 - **Manage and Direct – leading**
 - **Avoid confusion – probing, funnel**
 - **De-fuse a heated situation – funnel**



Qualitative Discussion – Stop Fishing, Start Focusing

- **Fishing is...**
 - **Putting something in the discussion to see if something turns out**
 - **“I hope this question helps find efficiencies”**
- **Focusing is...**
 - **Have a clear strategy to run down information that you need**
 - **“I am crossing this possibility off my list”**



Qualitative Discussion – Stop Fishing, Start Focusing

- **Fishing is...**
 - **“How is call center staffing?”**
- **Focusing is...**
 - **“I’m sure staffing for the call center wasn’t at full strength July 1. How much savings do you anticipate in stagger starting?”**



Fish OR Focus

- **Is the building going to be open and operational July 1st?**
- **\$100,000 was spent on roof repairs from your operational budget. Since you stated these one-time repairs were completed on May 15th, you won't need them for the upcoming fiscal year.**
- **OPB funded 6 months of funding for the new position, but you'll wait until the Appropriations Act is signed for the Amended budget to start filling that position.**



Fish OR Focus

- **Let's practice...**
- **DHS is approved to add 100 DFCS agents in the amended budget. How would you focus to find money possibilities?**
- **Aviation Authority spent \$100 less per flight hour this year so far than their average last year. How would you focus to find money possibilities?**



Questions?

