Qualitative Questioning
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 1\textsuperscript{st}?

• $100,000 was spent on roof repairs from your operational budget. Since you stated these one-time repairs were completed on May 15\textsuperscript{th}, 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?