

Inquiry Skills – Managing Productive and Clarifying Dialogue

A Case Study: How many times a day do you suspect something like this happens “out there” in reality?

A series of text message exchanges:

- Manager: hey. do u have time 2 do feasibility study?
- Staff: sure.
- Manager: gr8. go 4 it. John has client file.
- Staff: k.

Uh oh – guess what happened next:

- The staff person grabbed the wrong file from John’s desk and spent 20 hours working on a feasibility study for the wrong client **and** was focused upon the wrong issue.
- Time was not planned for required internal review procedures because a deadline was never clarified.
- The wrong format was used and the analysis was flawed because the staff person had shaky Excel spreadsheet skills – also an issue on a previous project with another manager. Excel training had been scheduled for the following week.

Outcomes:

- Of course the time could not be billed to a client.
- Much worse yet, the client was lost because she needed the study for an important meeting.

Observations:

- 5 minutes of **effective** inquiry and clarifying dialogue on the front-end could have made all the difference.
- Client/issue, deadlines, internal review procedures, format, and any other issues including the need for Excel help could have been identified, clarified, and addressed.