

Case Study

Asking Open-Ended Questions

Asking open-ended questions is one of the hardest things about coaching—especially when you’ve got a lot of other things on your mind. This case study moves beyond key words like “how” and “what” to show you how these questions work in action. Read Part A of the case, then pause to consider how you would use open-ended questions to lead a follow-up conversation with this employee. Then read Part B to see how your approach compares with that of Ashley, the coach in this case.

Remember, your goal as a coach is not to surface information and arrive at a solution, but to help your employee do these things herself. Your guiding concern isn’t “What do I want to learn by asking this question?” but “What do I want my employee to learn when she answers it?”

Part A

SONIA MARKS HAD A HEAD FOR FIGURES.

It was her quantitative skills that had earned her a position as an operations analyst at Lopez Industries in the first place. Of course, technical training didn’t guarantee a work ethic, and Ashley, Sonia’s manager, had been pleasantly surprised to find in Sonia an employee who was genuinely engaged with her work. In part, Sonia’s productivity seemed to be a result of her type A personality. But she also exhibited a more general interest in Lopez’s mission to source and distribute hardware goods. Sonia was one of few people in the office who regularly read trade publications, and Ashley had once overheard her in the break room telling a coworker with a botched kitchen rehab how to rehang cabinet doors.

Lately Ashley had been considering how Sonia might advance in the operations department. Sonia had the kind of strategic, synthetic intelligence that could take her far, but her role so far was limited to a narrow set of tasks that she performed mostly on her own. She worked with data sets, not with people. In fact, the kitchen cabinet conversation was typical of her workplace interactions: one-sided and didactic. Sonia’s presentations were no better, delivered with little care for whether her audience actually understood or agreed with what she was saying.

Sonia’s future success would depend on her ability to collaborate with and relate to other people, be they clients or coworkers. With this in mind, Ashley began scheduling monthly coaching sessions with Sonia. In their first meeting, Sonia confirmed to Ashley that she felt disconnected from other people at work. But she didn’t seem aware of her poor performance as a presenter and in fact

surprised Ashley by expressing a desire to join in on the team's interdepartmental presentations. Ashley repressed her initial reaction to this news ("God, no!") and told Sonia instead that she was eager to develop Sonia's presentation skills. Ashley further suggested that Sonia might look at the question-and-answer part of her upcoming presentation as an opportunity to connect more meaningfully with her coworkers. Sonia seemed to like this idea and offered to prepare a discussion guide for the Q&A.

The day of Sonia's presentation was like a four-alarm fire for Ashley. There had been a power outage at a Lopez warehouse the night before, and Ashley hadn't gone to bed until late. Her morning was devoted to tense conference calls punctuated by several harried meetings with her own manager. He wasn't unkind, but he wasn't happy, either.

Needless to say, Ashley wasn't exactly looking forward to Sonia's big presentation. And unfortunately, it did not go well. Sonia's efforts to engage her audience in the Q&A were awkwardly aggressive. More disappointing, she seemed to view her role not as facilitating a dialogue among her colleagues, but rather as administering a sort of oral exam. Her curt dismissal of one confused coworker made Ashley wince with sympathy. After serving as a punching bag for other people's anxieties all day, Ashley felt almost angry that Sonia just wasn't getting it.

As they had arranged beforehand, Sonia followed Ashley back to her office after the presentation to debrief. Ashley knew that if she didn't rein in her own frustration, the way she handled this conversation could do serious damage to Sonia's motivation. The manager could just imagine the exchange:

ASHLEY: Why did you respond to John's question that way? Do you really think you clarified anything for him?

SONIA: Yes! I mean, I thought his question was argumentative, not substantive. It wasn't a real question. If I entertained every bad idea, I wouldn't be doing my job.

Or worse:

SONIA [despondent]: I just didn't know what to say to make him understand. I'm so sorry. I'm really bad at this, and I don't know if I can get better.

To help Sonia learn from what had just happened, Ashley knew she needed to table her own frustration and anxiety from the day. Composing herself, she began to speak.

Pause here: What kinds of questions would you ask Sonia to help her see the problems with her presentation style and address them in a positive way?

Part B

Positive reinforcement, in a neutral tone, seemed like a good way to start.

“First things first,” Ashley said. “I’m glad you tried out something new. It’s hard to do that, especially in a public setting.”

Sonia smiled wryly. “Thanks. I’m glad I tried, too, but it was definitely hard.”

“What was hard about it?”

Sonia thought for a moment. “It was hard to keep track of what I was doing, I think. The presentation part was OK, but the Q&A seemed a little manic. It was hard to bring everyone along, to come to a consensus.”

Ashley was glad to hear that the Q&A had flustered Sonia, too. “Let’s talk about the Q&A, then,” Ashley said. “How do you think the discussion guide worked out?”

“Well, it was helpful for me just to have something to go on. I felt really responsible for making the conversation productive, and sometimes I would blank on anything to say. So it was good to have a script.”

That was a useful observation. Ashley rephrased the point, to drive it home. “It sounds like the questions gave you some confidence. I could see that in your performance.”

Sonia nodded enthusiastically. “Definitely. But I also felt like I couldn’t follow it too closely. The conversation had a life of its own—people kept bringing up things I didn’t want to linger on, things I thought were distractions. But I couldn’t move them away from that stuff and back on point.”

To Ashley, this was the heart of the matter. Sonia had failed to engage with the audience members where they were, to explain her ideas to the actual people in the room.

“Tell me more about that,” Ashley said. “Why do you think people were bringing up things you felt were distractions?”

Sonia stared at her, nonplussed. “I don’t know. I mean, that’s what was so frustrating about it. People were just off topic.”

OK, I struck out with that question, Ashley thought. She rephrased it. “I see how that frustrated you. Let’s flip it around, though. When people were lingering on certain points and you tried to get them back to your discussion guide question—what do you think the impact of those exchanges was on the people in your audience?”

A sheepish expression stole across Sonia’s face. “Not good. They were ... confused.”

Score. “Yes, I think some of them were confused. What do you think contributed to their confusion?”

“I think they had a really hard time with some of my methods and assumptions. I suppose that part

of my presentation was hard to follow.” Sonia’s sheepishness was quickly morphing into alarm. “I was probably a little harsh with some of those questions. I mean, I thought some of them were just playing devil’s advocate, and I found that really annoying. But if they were real questions ... I could have handled that better.”

Before Sonia became completely demoralized, Ashley broke in. “OK, so in an ideal world, how would the Q&A have gone?”

Sonia thought for a moment. “I guess I would have responded to their confusion better. But I also really would have liked to get into some other things in the discussion—more like what I put in my discussion guide.”

“OK. If I’m hearing you right, there are two things you want here: to do a better job communicating your ideas with the audience and to have time to get into some second-order discussions. Is that right?”

“Yes,” Sonia said firmly. “That’s it.”

“I think those are both key things for a successful presentation. Looking forward to your next one, how could you prepare differently to meet those goals?”

“Well, this time I was pretty surprised by what people didn’t understand. I guess that’s why it felt like their questions were off topic.” Sonia considered the matter. “Maybe I could try rehearsing it with someone in the office or just getting feedback on the key points, so I know ahead of time what’s likely to be confusing.”

“I like that idea,” Ashley said, smiling. It would help strengthen Sonia’s ties in the office, too. “How would you use the feedback?”

“I could change the confusing parts of the presentation. Hopefully, that would free up more discussion time for those second-order questions I want to bring up. At any rate, I’d be more prepared to hear people’s questions during the Q&A, I think.”

“Sounds like a plan. Do you need anything from me to make that happen?”

Sonia gathered her things in her lap. “No, thanks. I’ll ask around the office.”

“OK. You’re presenting again in three weeks, right? Let’s meet for a couple of minutes on this plan the week before your talk. And let me know if you want help finding a critique partner.”

Sonia made her way to the door. “I will. Thanks again, Ashley. This was really helpful!”

For me, too, Ashley thought as the door closed.