

EXECUTIVE SUMMARY: Too often, the questions we ask don't necessarily elicit the response required or desired, nor do they allow us to drill down to the core issues that are troubling a client. Frustration, added time, unhappy clients or families and ineffective solutions or unresolved matters may be the result.

The frame used around questions leads to dramatically different responses. Specifically, the use of an outcome-based frame tends to elicit more helpful and deep responses, than those questions that frame around the problem.

Further, the technique of allowing the interviewee not to answer questions, but simply to rate the questions helpfulness toward discovering the problem added another powerful tool.

BACKGROUND: Hartley Goldstone details this distinction of problem vs. outcome based questions in the first chapters of *Trustworthy*¹. Building on the wonderful presentation and interactive session led by [Ian McDermott](#) at the 2013 Rendezvous conference of the [Purposeful Planning Institute](#).

We presented and facilitated two sessions at our Chicago Trustee Collaboratory. The first exercise focused on how to ask better questions. We asked questions that were alternatively problem and outcome-based. The results consistently demonstrated the greater effectiveness of outcome-based questions.

In the second session we utilized an additional technique of having the interviewee rate the helpfulness of questions - whether framed as problem or outcome based - rather than answer them. Using this technique along with

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conscious framing proved an effective questioning technique. The follow is a discussion of the results from our second session at the Collaboratory.

Problem vs. Outcome questions: To simply explain the distinction, problem-based questions center on the problem itself. So, the question, “how do we stop the beneficiary from wasting trust assets?” is a problem-based question. Problem based questions can be experienced as negative, and may not allow the interviewee to expand his thought process beyond the problem in order to experience solutions.

On the other hand, outcome based questions are more open and typically offer possibilities for how the issue could look with the desired outcome the interviewee is seeking. This can give the client hope, new energy and a new pathway to take the next step or to fully resolve the issue. So, here’s one outcome-based version of the question in the last paragraph: “How do we help the beneficiary use trust assets more efficiently and effectively to get where he wants?”.

The technique of rating questions: One person is asked to share an issue they are grappling with very briefly and generally without getting into the specifics of the issue at hand. Then going around the table, each member asks one problem-based question. Whereas in part 1 we used specific questions provided as either the problem focused or outcome focused, these roundtable questions are created by the interviewer in the moment, based on the issue presented as well as the previous questions that others have asked. The person being interviewed does not answer the question, but rather rates the question on a 1 to 10 scale for how closely that question addresses their issue and helps them toward a solution. As the rounds of questions continue, the questions asked become more focused on the issue and moves the interviewee forward. The rating of high or low doesn’t get assessed as “good” or “bad” but rather both the high and low ratings serve as feedback towards creating targeted questions helpful to moving toward

a solution or next step. The contrast between problem-based questions and outcome-based questions is very illuminating as the questions become more focused. The process illustrated included rounds of questions that were problem based and then rounds of questions using outcome based questions. This gave all those involved a sense of the value of each question type to assist clients in the issues they are dealing with.

What were the results? The group members asking the questions found that the type of question asked, allowed them to get deeper into the issue, even though a direct answer to the question was not provided. It served as a valuable tool for honing their question-asking skills.

Possible Applications. During the debriefing of the experience from both the interviewee and the interviewers, the members present had these things to say about the value and experience with this exercise:

- Do we think we can learn what our best questions are? By asking our own questions and hearing those asked by other members, many felt we can develop patterns of questions that impact people's comfort levels and get them to the source of the most effective solutions to their issue. Depending on the situation, a professional may want their client to be more realistic about their situation, and perhaps highlight their pain, while in another situation the goal may be to show compassion and build relationship. The questions used can influence the desired impact.
- There is effectiveness in using both types of questions, problem based and outcome based, depending on the situation. For example, in medical or law school or more concrete matters, problem-based questions are useful. In professional Trustee practices, it was felt the outcome-based model would be most effective for many situations with the intention to empower the client in being able to realize the best solution or next step to resolve their issue.
- The approach of the interviewee rating the helpfulness of questions without the need to provide an answer minimizes defensive or positional responses and helps the interviewee feel more comfortable. The

interviewee is empowered at the source of realizing the solution or the next action to take regarding their situation. The interviewers have the opportunity to give the interviewee things to think about, without putting them in an awkward position of having to answer them in the moment or answering them publicly.

- Given that the problems of one client may be experienced by others, this questioning style could be helpful in determining the most effective questions to ask those similar clients. Receiving their feedback as to how it was helpful to them will allow a specialist to hone their expertise in how to achieve this in the most efficient and effective line of questioning.
- The outcome based model helps the interviewee realize what is within their power to control and what is not.

Conclusions Our study of this combined approach of using problem-based and outcome-based questions and a reflective rating scale of how effective the questions are, was productive. We consider this a useful tool for the generative trustee in working with clients as well as with other professionals in learning-based committee work, professional development, collaborative conferences and peer meetings.

The Chicago Collaboratory group felt it would be advantageous to share this experience with its source, Ian McDermott, (Chief Learning Officer of the Purposeful Planning Institute) as well as to encourage other professionals to practice using it and expand its application and value within the Trustee professional community.