Systemic Questionnaire

Idea In Short

As the saying goes:

> You ask, you lead

Questions set the course for lines of thought and dialogue. Questionnaires constitute every consultant's repertoire. Questionnaires are, by far, the most important measurement techniques that consultants use to grasp phenomena they want to measure.

Systemic inquiry is a philosophy of research and action that relates elements of the situation together, viewing a problem-situation as an interrelated set of cause-effect relationships or phenomena. Francis Bacon, an early philosopher of the scientific method, advised:

> A prudent question is one half of wisdom

Likewise, a good question is one half of your research problem solved.

Systemic questionnaire technique

The systemic questionnaire technique is a standardized interview technique through which consultants interview several people on a topic using the same scheme. Consultants work out the questions in advance. They create a pre-defined question structure. Subsequently, they can compare the qualitative responses using a question grid.

Execution

Consultants use the prepared questionnaire and collect responses from interviewees. They

use follow-up questions to drill down into the responses. Sometimes, they may pose additional prepared follow-up questions during the interview. After the interview, they share the questions and the documented responses with the interviewees for review for feedback. This way, they identify and resolve any misunderstandings. The interviewees also have the opportunity to correct their responses. Circular questions, such as the one below make the interviewee aware that not only his / her own perspective is involved, but also those that contradict it.

> What do you think your colleague, your boss, your employee would say to this question?

When interviewee perspectives diverge, the interview gets more interesting. Hence, this method is an excellent tool for collecting expectations from a diverse pool of interviewees. If you interview the important stakeholders using a standardized approach, you receive well-founded responses.

Question types

Every interview begins with information about the interviewee and their role in the system. Even if you know this, make sure to pose this question. The interviewee's self-assessment of his / her role and the chosen formulation provide interesting insights. The continue the interview by posing your prepared questions on the topic.

Scale

These questions provide information on the positioning of the interviewee (e.g. on the assessment of the importance of the initiative or the evaluation of the current situation).

Change

These questions indicate desired changes and should be as captured as detailed as possible. For example, you may post such a question:

> Assuming the initiative is a success, what is different (3-5 aspects)?

Such a formulation forces the interviewee to take a position and articulate what is important to him / her. Follow-up questions often help here:

> What exactly do you understand by my situation has improved? What would you specifically attribute this to?

You can sequence such simple questions to arrive at the root of the problem. You first pose a scale question about the position and then elicit details of the desired change from the interviewee's point of view. For example:

- On a scale of 0-10, how important is this project to you? (0 = Totally unimportant, 10 = Extremely important)?
- What would have to happen for your rating on the scale to improve by one stroke?
- What and how could you contribute?
- How would your boss answer this question?

Provocation

In my opinion, you should include a provocative question in the systemic questionnaire technique. The provocative question probes the interviewee about what would have to happen for something to get worse. This question uses the same concepts as the headstand brainstorming technique. Interviewees find such question is widely unfamiliar and therefore causes irritation, which leads them into sharing honest answers without hidden agenda. Furthermore, these questions also promote creativity as it triggers personal concern. For example:

> What exactly could I do to worsen your situation as a result of the initiative?

The response to such a question will surprise you. You may have to infuse such provocative questions throughout the systemic questionnaire. This is because, in the business context, we rarely deal with the fact that something is getting worse. But it is important to acknowledge this possibility because it highlights the consequences of our actions and designs.

Recommendations

Use a combination of several small question sequences to compile an effective systemic questionnaire. Group related topics to avoid redundancy and use the time to focus on different relevant topics. Contradictory responses arouse interest, also in interviews. These demonstrate that, either I - the interviewer - has not fully grasped something in depth, or there really is a contradiction. Usually, interviewees are ambivalent in their ideas and expectations. However, as interviewers, we are not always aware of these. This realization helps both, the interviewer and the interviewee. You should address glaring contradictions right away in the interview without reproach:

> I'm not sure that I understood you correctly. Earlier I understood X, but now, I hear Y. To me, this looks like a contradiction. Could you elaborate, please?

Usage

Systemic questionnaire is a robust and simple technique that even junior consultants can execute with confidence. I found this technique extremely useful, early on in my consulting career. You just have to prepare the relevant questions in advance. I also took printed copies of the questionnaire that the interviewees appreciated. Such simple questions uncover dense information and set expectations among your clients and interviewees. With a more experience, you can customize and expand the spectrum of your systemic questionnaire technique: Simple, but highly effective, for example, is the question:

> Assuming the initiative is a success from your point of view, what would you miss?

Interviewees appreciate this question because you are proactively asking them to identify areas that are central to the problem. Usually, I pose these questions after I have gathered responses to the questions I absolutely want answered. However, I observed that these questions trigger reflection among interviewees. They tend to weigh up successes and possible losses among alternatives and point you in the right direction.

Metaphors

I love metaphors. Metaphorical language - which includes metaphors, similes, analogies, and other comparisons - is a powerful tool in communications and consulting. During such interviews, I pose off-topic questions, such as:

> In your view, which animal symbolises resistance to such an initiative?

In the case of corporate initiatives ordered from above, resistance is latent. Such resistance comes to light in the form of such animal metaphors. Subsequently, you can engage in a humorous exchange with your interviewee. This not only relaxes them and catalyzes more information sharing, but also helps build deep inter-personal relationships. Metaphors can spark new associations and understandings, putting an issue in a new light and prompting people to rethink their opinions or assumptions. Hence. systemic questions are highly effective in eliciting latent information that the interviewees wish to share. In any case, as consultants, you should assure the interviewee of strict confidentiality and stick to it.

Information handling

This does not mean that you are not allowed to pass on and evaluate the responses. But, ensure that you anonymize the responses can't be traced back to an individual. That would vastly undermine the trust that you built with your interviewees. You should abstract the responses, so nobody can interpret who took which perspective or reverse-engineer anecdotes. This is all the more important if you want to improve organizations' management styles. Sometimes, some influential critics would like to be quoted by name. In such a case, the client confidentiality applies. You may want to relax the mutual confidentiality agreement. But, in my experience, this never boded well with both, interviewees (who perceived our firm as untrustworthy), clients and the consulting firm.

Good practices

During the interview beginning, I ask the interviewee whether there is anything the interviewee would like to address during the interview and make a note of it. In the end, I ask whether I adequately addressed the interviewee's concerns. If something is still open, I take those points to follow up with the interviewee. Usually, these are updates to the interviews, decisions, new organizational structure, etc. Give the interviewee the good feeling that they are listened to and not just schematically questioned. In the case of more involved

questionnaires (lasting approximately 1-1.5 hours, or longer), I suggest sharing summaries of the interviewees' responses in a written form, so they can correct any misinterpretations. Likewise, compile and distribute the 3-5-7 core messages that you gathered during the interview. Most interviewees are particularly concerned with certain aspects of the topic. This helps your interviewees shield themselves from organizational politics and repercussions. It is also an easy way to checking whether you understood the interviewee and his/her concerns.

Summary

Systemic questionnaire is a highly effective method to collect qualitative, structured collection of expectations, requirements and limitations of different stakeholders of an initiative. Systemic questioning's consistent, multi-faceted use is still unfamiliar among business circles.

Sentiments, such as aggravation, resistance, irritation or the reference to possible losses generate perplexity and honesty instead of politics. Hence, a consultant should focus on both, the quality of the results and strength of relationships.

Note-taking and writing things down will help build trust with the interviewees; they get to participate in the correction loop, which also helps you gain a deep understanding of the client problem. Prepare the questions in advance of the interview and inform your interviewees that you are using a questionnaire as a template.

This technique also provides junior consultants the opportunity to conduct interviews with key client stakeholders and demonstrate merits. This helps them gradually build up both, confidence and consulting competence.