

A Consultant's guide to effective client discovery

Purpose of this guide

This guide supports consultants using TBI discovery questions during early client conversations.

The questions are designed to help you:

- Connect team effectiveness to the client's strategic and commercial priorities
- Understand the behaviours, systems and relationships affecting performance
- Establish what development activity has already been attempted
- Assess leadership sponsorship and readiness for change
- Identify a credible pilot team
- Define meaningful and measurable outcomes
- Qualify whether TBI is the right response

The questions are not intended to be used as a fixed questionnaire. Select and sequence them according to the conversation, using follow-up questions to explore the evidence behind the client's initial answers.

1. How to use the questions

Start with the business, not the intervention

Begin by understanding what the organisation is trying to achieve and why team performance matters now. Avoid moving too quickly into a discussion about workshops, programmes or solutions.

Follow the client's language

Listen for the words the client uses to describe their ambitions, frustrations and priorities. Reuse this language in your follow-up questions to demonstrate understanding and keep the conversation grounded in their context.

Explore evidence before drawing conclusions

When a client describes a team as "misaligned", "siloed" or "not accountable", ask for examples. Separate observable facts from interpretations and assumptions.

Useful prompts include:

- What are you seeing or hearing that leads you to that conclusion?
- Can you give me a recent example?

- What impact is that having?
- Who else would recognise this?
- How frequently does it happen?

Move from symptoms to underlying causes

A presenting issue may have several causes. For example, slow decision-making could reflect unclear authority, competing priorities, limited trust, poor meeting disciplines or dependencies outside the team.

Use the questions to develop hypotheses, but do not diagnose the problem before hearing from the wider team.

Keep discovery conversational

You will rarely need to ask every question. A good discovery conversation should feel relevant and responsive, rather than like an interview or audit.

2. Core discovery questions

These five questions provide a strong starting point for most conversations.

1. **Which teams are most important to current performance?**
2. **Where are team behaviours enabling or constraining progress?**
3. **What development activity has already been attempted?**
4. **What would a meaningful improvement look like?**
5. **Which team could provide a credible and useful pilot?**

Use the sections below to deepen the conversation.

3. Business context and strategic relevance

Objective

Understand why team effectiveness matters to the organisation and connect the conversation to tangible business priorities.

Questions

- What are the organisation's most important priorities over the next 12 to 18 months?
- Which of those priorities depends most heavily on effective collaboration between teams?
- Where is the greatest gap between the organisation's ambition and current performance?
- Which business challenges are proving difficult to resolve through existing approaches?
- What has changed recently that makes this issue more important now?

- What business outcomes could be accelerated by improving team effectiveness?
- What are the consequences if nothing changes?
- Where would stronger alignment, decision-making or accountability have the greatest impact?

Consultant prompts

Use follow-up questions to make the issue more specific:

- What does that mean operationally?
- How does that affect customers, colleagues or commercial performance?
- How visible is the issue to senior leaders?
- Is this an isolated challenge or a broader organisational pattern?
- Why is addressing it a priority now?

Listen for

- A clear and pressing business need
- Strategic dependencies between teams
- Costs associated with delay, duplication or poor decisions
- Specific outcomes that TBI could support
- Executive visibility and urgency

4. Current team performance

Objective

Identify which teams matter most and understand how effectively they are currently operating.

Questions

- Which teams are most important to delivering the organisation's current priorities?
- Which teams are performing particularly well, and what appears to enable that?
- Which teams are finding it harder to deliver?
- What are those teams struggling to do consistently?
- Where do you see the greatest variation between teams?
- How clear are teams about their purpose, priorities and accountabilities?
- How effectively do they make and implement decisions?
- How well do they manage dependencies with other teams?

- Where does work tend to slow down, become duplicated or fall between responsibilities?
- What indicators currently tell you whether a team is effective?

Consultant prompts

- Can you give me a recent example?
- What happened as a result?
- Is that an isolated event or a recurring pattern?
- How might team members describe the situation?
- What would customers or internal stakeholders notice?
- What evidence supports that view?

Listen for

- Observable patterns rather than general opinions
- Unclear priorities or decision rights
- Weak accountability
- Cross-team dependencies
- Avoidance of difficult conversations
- Differences between leadership perception and team experience

5. Behaviours and team dynamics

Objective

Explore how everyday behaviours enable or constrain delivery, without evaluating or labelling individual employees.

Questions

- Where are team behaviours enabling progress?
- Where are team behaviours constraining progress?
- What happens when team members disagree?
- How openly are risks, concerns and mistakes discussed?
- Which important conversations are not currently happening?
- How consistently do people challenge ideas while maintaining constructive relationships?
- What happens when commitments are missed?
- How are competing priorities resolved?

Discovery Questions

- To what extent do team members feel able to ask for help?
- How well does the team balance pace with inclusion and quality?
- Which behaviours are reinforced by current leadership practices, processes or incentives?

Consultant prompts

- What do people actually say or do?
- In which situations is that most visible?
- What response does that behaviour generate from others?
- What might be keeping that pattern in place?
- Are there circumstances in which the team behaves differently?
- What can we learn from those exceptions?

Consultant note

Keep the discussion focused on team conditions, shared patterns and ways of working. Avoid inviting the client to diagnose or criticise individual employees.

6. Previous development activity

Objective

Understand what has already been attempted, what was learned and how TBI would need to be positioned differently.

Questions

- What development activity has already been attempted?
- What prompted that activity?
- What did it involve?
- What worked well?
- What did not produce the intended improvement?
- What changed afterwards, and for how long?
- How involved were team members in identifying the issues and shaping the response?
- How well was the activity connected to day-to-day work?
- What support did leaders provide before, during and after it?
- How was progress measured?

Discovery Questions

- What lessons should inform the next approach?
- What might cause people to see this as “another initiative”?

Consultant prompts

- What evidence was there of improvement?
- What helped any change to continue?
- What caused progress to fade?
- Were the underlying issues fully understood before action was taken?
- What would need to be different this time?

Listen for

- Development activity that was event-based rather than embedded
- Limited follow-through
- Lack of leadership sponsorship
- Solutions chosen before the problem was understood
- Initiative fatigue
- Useful learning that can shape the TBI approach

7. Leadership sponsorship and stakeholder alignment

Objective

Assess whether there is sufficient leadership commitment and stakeholder support to create meaningful change.

Questions

- Who is sponsoring this work?
- What outcomes are most important to the sponsor?
- How do senior leaders currently understand the challenge?
- How aligned are stakeholders about the nature of the issue?
- Who else needs to be involved in the discovery process?
- How visible and engaged are leaders prepared to be?
- What role will the team leader need to play?
- Which stakeholders will need to see early evidence of progress?
- Who could enable or block the work?

- How will leaders respond if the discovery surfaces issues beyond the team's direct control?
- What would give the team confidence that leaders genuinely support the process?

Consultant prompts

- What does active sponsorship look like in practice?
- What time and attention can the sponsor realistically provide?
- How will the sponsor communicate the purpose of the work?
- What expectations need to be agreed at the outset?

Listen for

- A sponsor with authority and genuine interest
- Willingness to hear challenging feedback
- Commitment to act on systemic issues
- Clarity about roles and expectations
- Risks associated with weak or symbolic sponsorship

8. Readiness for change

Objective

Understand whether the team and its leaders are ready to participate openly and act on what they learn.

Questions

- How receptive is the team likely to be to this conversation?
- How accustomed is the team to giving and receiving candid feedback?
- What might make team members cautious about participating?
- What would help create psychological safety?
- How much time and attention can the team realistically commit?
- What other changes or pressures are affecting the team?
- What appetite is there for experimenting with different ways of working?
- How willing is the leadership team to examine its own contribution?
- What needs to be communicated before the work begins?
- What could undermine engagement?

Consultant prompts

- What have you seen that leads you to that view?

- Are different groups likely to respond differently?
- What would a low-risk first step look like?
- How might we involve the team in shaping the process?

Listen for

- Openness to evidence and feedback
- Competing organisational pressures
- Trust in leadership
- Previous negative experiences
- Capacity to participate
- Willingness to test and learn

9. Defining meaningful improvement

Objective

Help the client translate a broad ambition into observable behavioural and business outcomes.

Questions

- What would a meaningful improvement look like?
- What would the team be doing differently?
- What would leaders notice?
- What would team members notice?
- What would customers or internal stakeholders notice?
- Which decisions would be made more effectively?
- Where would delivery become faster, simpler or more reliable?
- Which behavioural changes would indicate early progress?
- Which operational or commercial measures could show longer-term impact?
- What would stakeholders be saying in six months if the work had been successful?
- What degree of improvement would justify further investment?
- What would success look like at team, leadership and organisational levels?

Consultant prompts

- How could we observe that?

Discovery Questions

- How could we measure it?
- What is the current baseline?
- Which indicators are already available?
- What might improve first?
- Which outcomes are within the team's control?

Consultant note

Avoid promising a direct causal relationship between team development and a single business metric. Agree a balanced set of indicators, including observable behaviours, team experience and relevant performance measures.

10. Selecting a pilot team

Objective

Identify a pilot that is strategically relevant, ready to engage and capable of generating credible learning.

Questions

- Which team could provide a credible and useful pilot?
- Which team is sufficiently important for the results to matter?
- Which team has a clear business challenge that improved effectiveness could support?
- Which team is experiencing enough difficulty to generate meaningful learning?