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Ask Better Questions, Get Better Insights

Finding the big question behind every dashboard, report, and data request

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WHY WE'RE HERE

Every report request is a question in disguise.

MONDAY, 9:02 AM

"Can you pull spend by firm for the last 12 months? Need it by Friday."

TWO WEEKS LATER

"Thanks... but that's not really what I needed."

Sound familiar?

In the next 50 minutes

We'll find the question behind the request, and put it to work.

01 LEARN

The Big Question framework

Four steps to find the decision hiding behind any request.

02 PRACTICE

On a real request from your world

Pen, paper, and your table. Six minutes.

03 APPLY

Turn it into a better AI prompt

Then watch the answer improve, live.

THE FLOW



Not a product demo. Not a data model class. A working session, so grab a pen.

Section 1

Most analytics conversations start one question too late

THE NEED

The GC keeps getting surprised by budget overruns.

THE QUESTION

Which matters will go over before we can act?

THE REQUEST

“Can I get a report of matters over budget?”

Where the value is: the need and the question

Where most analytics starts

The room usually asks for a report. The business usually needs a decision.

The question trap

Four requests you'll hear this month. Each sounds specific. Each hides the real need.

THE ARTIFACT TRAP

"Can I get a report that shows invoices by status?"

Underneath: Which invoices are stuck, and who needs to chase them?

THE EXPORT TRAP

"Can I export this to Excel?"

Underneath: "I rebuild this every month-end to forecast accruals." A hidden workflow.

THE REBUILD TRAP

"Can you recreate my old firm scorecard?"

Underneath: "I used it to decide which firms get new matters."

THE MAGIC ANSWER TRAP

"Can AI tell me what's going on with spend?"

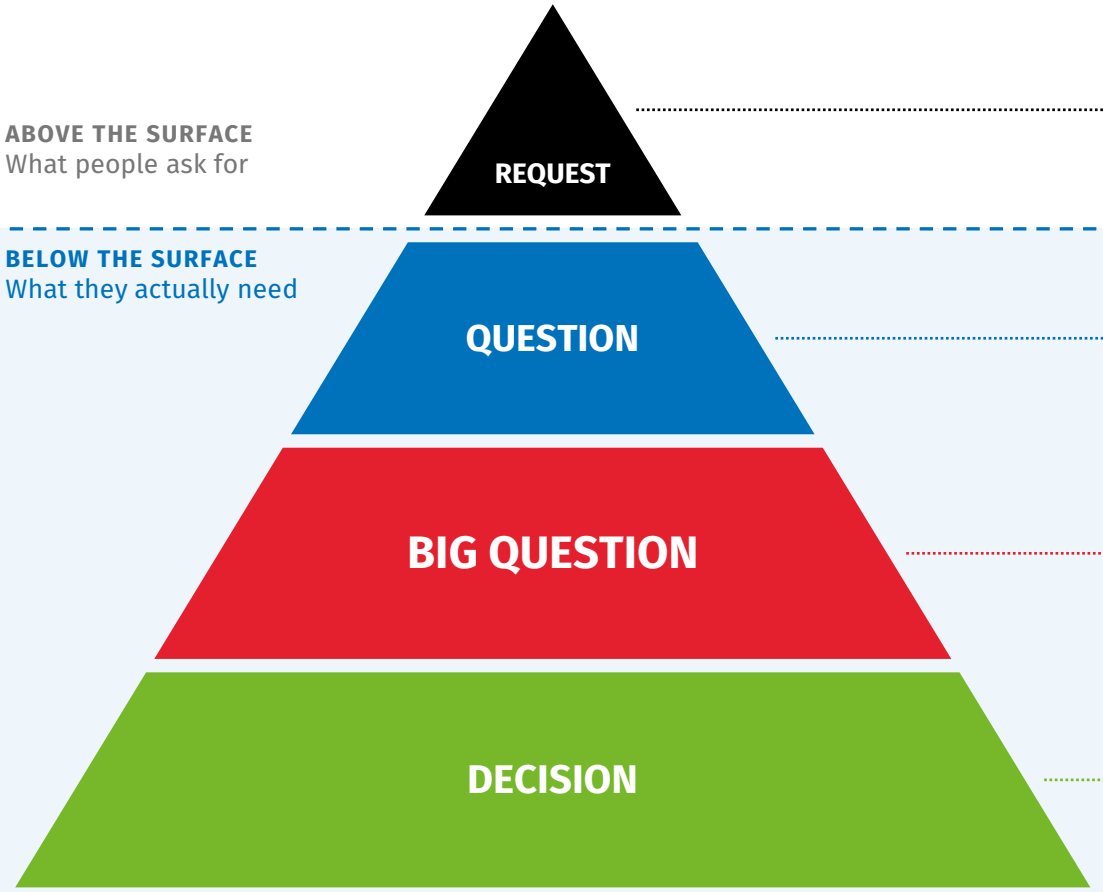
Underneath: Why did spend jump last quarter, and is it a one-off?

Provocation: analytics can answer the wrong question very efficiently.

The Big Question framework

Every request sits on top of a decision. The value is below the waterline.

ABOVE THE SURFACE
What people ask for



BELOW THE SURFACE
What they actually need

1 Request

What they asked for, in their words.

Ask: *"What prompted this request?"*

2 Question

What they are trying to understand.

Ask: *"What are you hoping to find out?"*

3 Big Question

THE ONE THAT MATTERS

The decision that is really at stake.

Ask: *"What will you decide once you know?"*

4 Decision

The action that could change because of the answer.

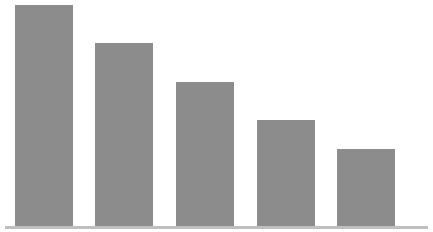
Ask: *"What would you do differently?"*

Example: spend by law firm

Same data, four conversations. Watch what you would build change at each step.

1 REQUEST

“Show me spend by law firm.”

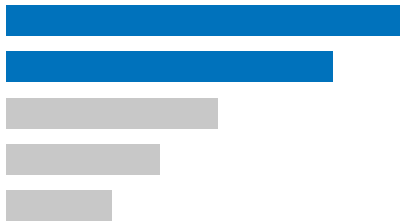


YOU BUILD

A bar chart of totals. Accurate, but it starts no conversation.

2 QUESTION

“Which firms are driving our costs?”

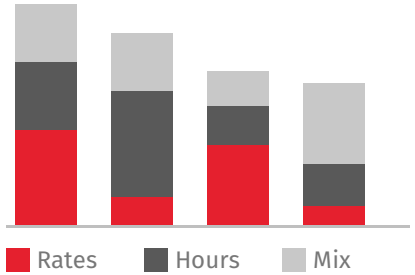


YOU BUILD

Firms ranked by change, not just by size.

3 BIG QUESTION

“Are we using the right firms for the right work, and what should we change?”



YOU BUILD

Each firm’s increase split into rates, hours, and matter mix.

4 DECISION

Decide which firms gain or lose work.

- ✓ **Rebalance work**
- ✓ **Negotiate fees**
- ✓ **Investigate drivers**

YOU GET

A decision about action, not just a better chart.

Example: matters over budget

The better question adds timing, risk, and intervention.

Request

“Show me matters over budget.”

Question

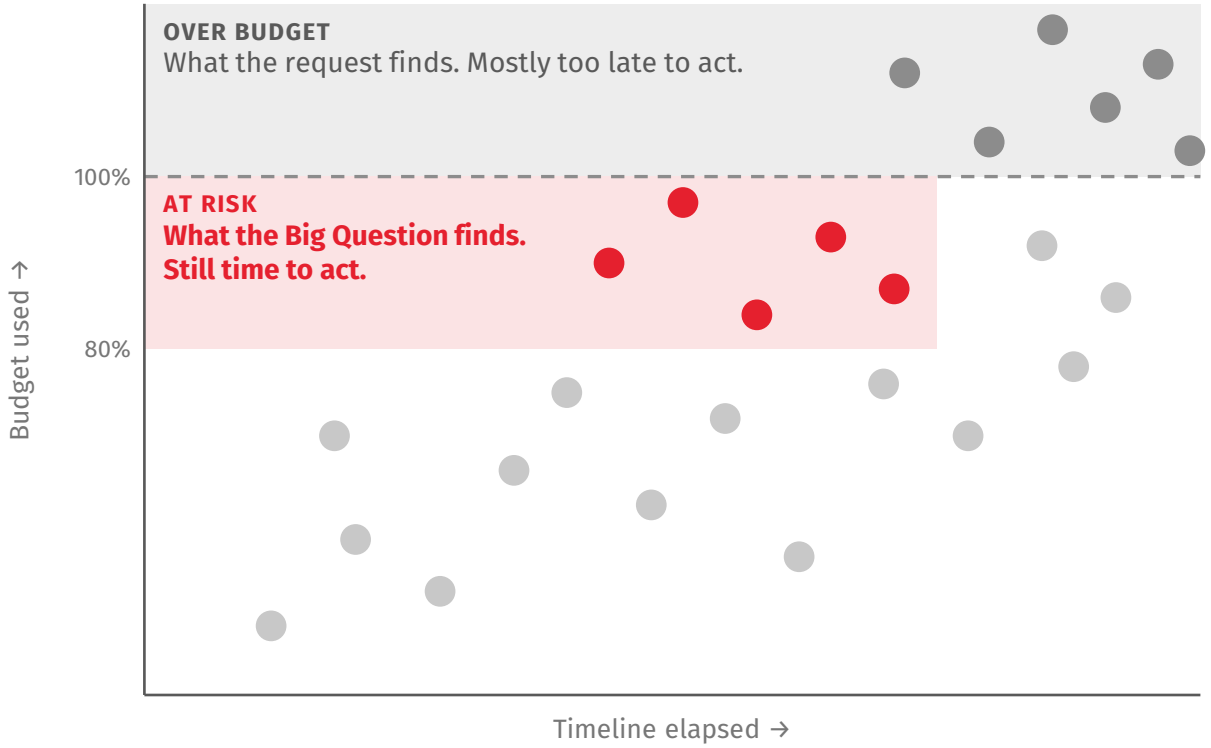
Which matters are exceeding expectations?

Big Question

Which active matters require intervention before budget risk becomes material?

Decision

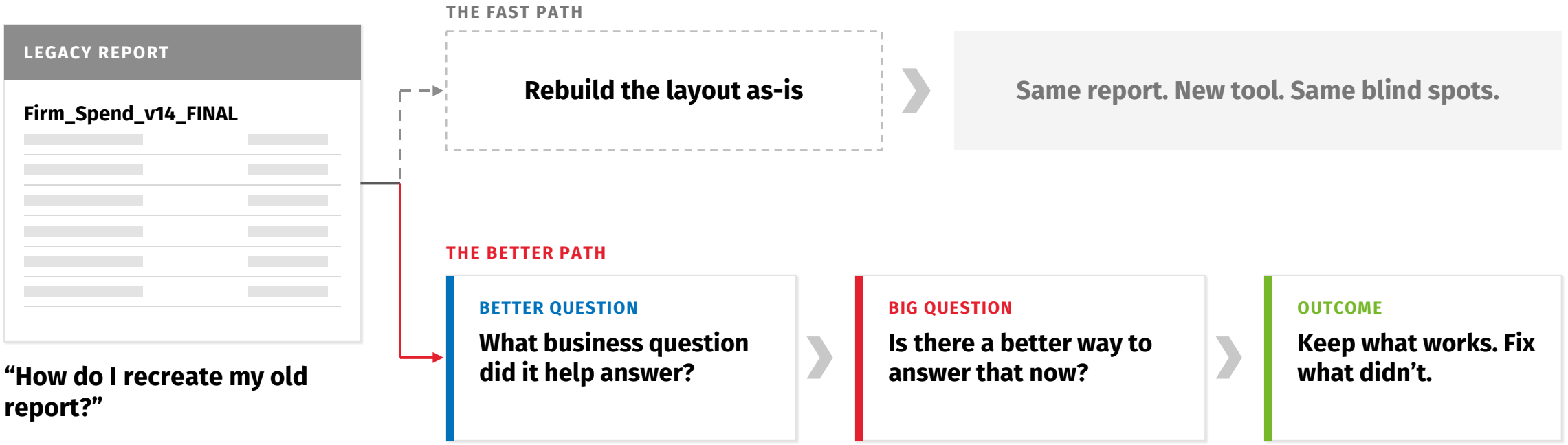
Prioritize matter reviews, adjust budgets, or engage the responsible team.



A report tells you where you are. A Big Question tells you where to focus.

Example: recreate my old report

Migration questions are often business questions in disguise.



Key facilitation line: "Let's understand the decision the old report supported before we rebuild the artifact."



Section 2

Practice: Find the Big Question

The audience now moves from listening to working.

How the exercise works

One real request. Seven boxes. Six minutes.

1 **Pick one real request** — 30 sec

A report, dashboard, or export people ask for often. Real beats hypothetical.

2 **Peel it back: boxes 1 to 3** — 2 min

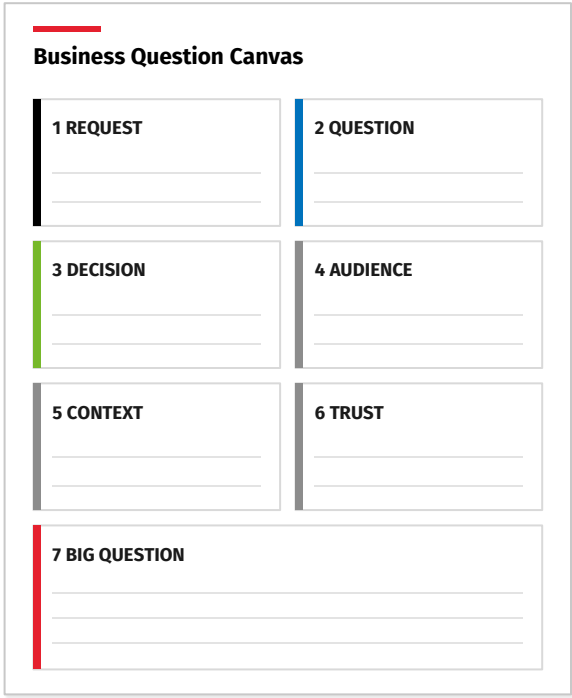
Request, then Question, then Decision. Keep asking “so that…?”

3 **Make it trustworthy: boxes 4 to 6** — 2 min

Who uses the answer, what context matters, what would make them doubt it.

4 **Write your Big Question: box 7** — 90 sec

One sentence: “We need to know ___ so that ___ can decide ___.”



Your handout

Share-out: “What changed when you moved from the request to the Big Question?”

Example: a filled-in canvas

The matters-over-budget request from earlier, worked through in about five minutes.

1 REQUEST

Show me matters over budget.

2 QUESTION

Which matters are going to blow their budget?

3 DECISION

Which matters the GC escalates at Monday's review.

4 AUDIENCE

General Counsel + litigation leads. Want the short list.

5 CONTEXT NEEDED

Active litigation matters only. Spend to date vs. budget.

6 TRUST CONDITIONS

"At risk" = 80%+ of budget used, 25%+ of timeline left.

7 BIG QUESTION

Which active matters need intervention before budget overruns become material?

Keep this example in mind: boxes 3 to 7 come back later as an AI prompt.



Break into groups or individuals and take **6 minutes** to go through the exercise.

Group discussion

Share what you found. Some of the best answers in this room will come from each other.

01

What is one question your business is trying to answer?

Not the report. The question underneath it.

FOR EXAMPLE

“Which firms should get our next big matter?”

02

What makes it hard?

Name the blocker. Most fall into one of these:

- **Access**
- **Definitions**
- **Trust**
- **Ownership**
- **Timing**
- **Interpretation**

03

How are others solving it?

Patterns, workarounds, and open questions from your peers.

FOR EXAMPLE

“We agreed on one definition of ‘at risk’ before building anything.”

Listen for the pattern: most blockers are definition and trust problems, not data problems.



Section 3: Take a drink, we're about to talk about "**AI**" again!

Coffee counts. Water counts.

Next up: turning your Big Question into a prompt AI can actually use.

HOUSE RULES

Hear "AI"?
Take a sip.

Hear "agentic"?
Get a refill.

The prompt ladder

Same data, three prompts. Only the question changes.

Each step up adds what AI can't guess: why you're asking, what to test, and the decision it feeds.

Request prompt

"Show me outside counsel spend."

AI has to guess: which period, which firms, compared with what.

YOU GET

One total. Accurate, not actionable.

Question prompt

"Which firms drove the increase in outside counsel spend last quarter, compared with the quarter before?"

Adds: a comparison and a focus.

YOU GET

A ranked list. The what, not the why.

Big Question prompt

"I'm preparing for next month's outside counsel panel review, where we decide which firms gain or lose work. Which firms drove last quarter's spend increase versus the prior quarter, and was it higher rates, more hours, or a shift in matter mix? Recommend where to rebalance work. Flag one-off matters and any assumptions you made. Answer with a short table by firm, then three recommendations."

Adds: purpose, the decision, drivers to test, guardrails, and the shape of the answer.

YOU GET

Drivers, options, and assumptions you can check.

LIVE DEMO

DEMO

Same data. Three prompts. Watch the answer change.

1 **Request prompt** › 2 **Question prompt** › 3 **Big Question prompt**

WATCH FOR

- Does it answer the question, or just return data?
- Does it explain why: rates, hours, or matter mix?
- Does it point to a decision you can act on?
- Does it tell you what it assumed?

Anatomy of a question-driven prompt

Five parts. Four of them are already on your Business Question Canvas.

Goal	Why you are asking and what decision it supports.	Canvas: Decision
Context	Who it is for, scope, timeframe, and comparison.	Canvas: Audience, Context
Question	Your Big Question, stated plainly and specifically.	Canvas: Final Big Question
Guardrails	Definitions, data to include or exclude, what to flag.	Canvas: Trust conditions
Output	The shape of the answer: table, top 10, or 3 bullets.	New for AI

Write it like a briefing for a smart colleague who just joined the team.

Example: from Big Question to prompt

The matters-over-budget example, written for an AI assistant.

Big Question — Which active matters require intervention before budget risk becomes material?

PROMPT

Goal — I'm preparing for Monday's budget review, where our General Counsel will decide which matters to escalate.

Context — I manage outside counsel for the litigation group. Look at active matters only, comparing spend to date with approved budget.

Question — Which active matters need intervention before budget overruns become material?

Guardrails — Treat a matter as at risk if it has used more than 80% of its budget with over a quarter of its timeline left. Tell me any assumptions you make.

Output — Return the top 10 as a table (matter, firm, % of budget used, likely driver), then three bullets on where to act first.

Treat the first answer as a draft: ask what it assumed, then refine.

Example: the final prompt

All five parts in one message, ready to paste into an AI assistant. Each color marks one part.

Goal | Context | Question | Guardrails | Output

PROMPT

I'm preparing for Monday's budget review, where our General Counsel will decide which matters to escalate. I manage outside counsel for the litigation group. Look at active matters only, comparing spend to date with approved budget. Which active matters need intervention before budget overruns become material? Treat a matter as at risk if it has used more than 80% of its budget with over a quarter of its timeline left. Tell me any assumptions you make. Return the top 10 as a table (matter, firm, % of budget used, likely driver), then three bullets on where to act first.

No special syntax. Just a clear briefing, written in plain language.

Traps to avoid, and what to say instead

Steal these lines. Each one turns a request back into a question.

THE TRAP	SAY THIS INSTEAD
Starting with fields and filters It gets technical before anyone names the decision.	**“Before we pick fields, what will you decide with this?”**
Rebuilding the old report as-is Old assumptions move into the new tool.	**“What did this report help you decide? Is that still the decision?”**
Treating the export as the answer The real analysis stays hidden in a spreadsheet.	**“What do you do with it once it’s in Excel?”**
Asking AI a one-line question You get a fast answer to a vague question.	**Goal** **Context** **Question** **Guardrails** **Output**
Trusting the first answer Hidden assumptions quietly become decisions.	**“What did you assume? Show me what’s behind that number.”**

What to take back to your team

Three ideas, three habits. Start with the next request that lands on your desk.

1

Reports are rarely the real request.

People ask for data. They usually need a decision.

TRY THIS MONDAY

When the next request lands, ask “What will you decide with this?” before you build anything.

2

Every request has a Big Question underneath.

It’s usually one or two questions below the surface.

TRY THIS MONDAY

Use the canvas. Write the Big Question in one sentence before anyone opens a tool.

3

Your insight is only as good as your question.

True for dashboards, analysts, and AI.

TRY THIS MONDAY

Before you prompt, brief it: goal, context, question, guardrails, output.

IF YOU REMEMBER ONE QUESTION

“What decision will this answer support?”

Ask Better Questions, Get Better Insights



Thank you

Discussion prompt: What is the Big Question your organization needs to answer next?

Wolters Kluwer