

Moving to 3rd & 4th Order Questions to Build and Operate a Strong Team

A practical workshop for
leaders navigating new
content



Charter school leaders face complex financial and real estate decisions with high stakes and limited experience

Our goal is to equips you with a framework for clarifying your role and asking deeper questions earlier—helping you build and manage a team, with a discerning ear that develops faster than experience typically allows



We Start Strong

When we're smart but inexperienced in a domain, we naturally ask 1st- and 2nd-order questions. These come easily and feel productive.

Then We Stop Too Early

But most of us stop before reaching the 3rd and 4th orders—exactly where misalignment, hidden costs, and long-term operational issues live.

That's Where Risk Hides

The deepest problems emerge not from what we ask, but from what we don't think to ask. Surface-level conversations lead to surface-level partnerships.

The Question Arc



PLAY YOUR ROLE NOT THEIRS

All Team's need a lead – the more you know your business and where you want to go, the better you'll be at guiding the team and consuming the advice



TRUST YOUR INSTINCTS

If it Feel " Off" – It is ... improving your use of strategic pauses gives you time to test the information and your instincts



EARLY INVESTMENTS PAY LONG DIVIDENDS

- The sooner in the process you engage key partners the stronger the outcomes
- The more the team interacts the stronger their advice and ability to problem solve
- Information and expertise will be asymmetrical – and unforeseen issues will arise – take the time to build report and collaboration

The Framework

Deepen your inquiry—move from necessary basics to uncovering the assumptions and interdependencies



1st Order: Facts – Credentials & Experience

Purpose: Build context about who they are and what they've done

Example: "Share some information about yourselves that is not on your website." "Have you worked with schools like ours?"



2nd Order: Context, Market Trends, Patterns

Purpose: Explore market dynamics and what's changing

Example: "What trends are you seeing?" "What kinds of issues are you watching or noticing?"



3rd Order: Problem Solving Approach & Accountability

Purpose: Understand how they make decisions and handle challenges

Example: "How do you handle situations where you disagree with your client, or other members of the team?"



4th Order: Systems, Assumptions & Interconnected Impacts

Purpose: Surface how decisions ripple through your organization

Example: "How will this choice affect our business? Is this a decision that locks us in at all?"

The Hidden Power of 3rd & 4th Order Questions:

Identify patterns you can pull into real-world situations.

From "What" to "How" and "Why"

Shift the conversation from information exchange to revealing values, priorities, and decision-making frameworks.

Make Jargon Transparent

It becomes much harder to hide behind technical language and jargon when you're asking questions about assumptions and systemic impact.

Uncover Trade-Offs Alignment

Deeper questions force partners to articulate tensions in their recommendations and demonstrate their calculus on competing interests.

Signal Your Leadership

The questions you ask determine the relationship – improving the questions partners ask of you, the information they share, and the way they share it.

Testing the Answers

Spot the Red Flag

1

Given the current interest rate environment, I'd strongly recommend we close quickly. Rates are only going up. We're working with a bunch of schools right now who are moving quickly.

2

We've designed facilities for 47 charter schools nationwide, so we deeply understand the space requirements. We have standards we've vetted - we don't recommend deviating from what works.

3

Great question about the system. Let me walk you through our 20-year total cost of ownership analysis. The mechanical systems I'm recommending costs more up front, but requires less maintenance and repair, comes with stronger warranties, and ultimately has a lower operating cost. We can share numbers with your finance team so they can compare the two in your business.

Lightning Round



The Project

After 5 years of successfully operating a K-8 charter school, your state authorizing body approved your application for a second charter in a neighboring city.

You are interviewing potential partners to help you find a site. You want to consider all options for ground up construction or renovation / retrofit. .

You know that whatever path you choose, you will need financing.

You have two years to fulfill promises to families and funders.

Partner Interview Challenge

Your Mission: Practice using all four levels of questioning in real conversations. Listen carefully for both substance and red flags

01

Form Teams

Confirm your team.

02

Two Rounds

You'll participate in **two short interview rounds**. Each round lasts **5–7 minutes**. Each team has a facilitator role-playing as a potential partner.

03

Use All Four Orders

Your goal is to **ask questions spanning all four orders** — from basic information gathering to probing underlying assumptions.

04

Red Flag Alert

Expect strong answers and "**red flags**." Note both strong answers and "red flag" answers for a debrief share-out.

Reflection

What Did You Notice?

Identify patterns you can pull into real-world situations.

What Surprised You?

What answers made you sit up, pause, or ask a follow-up?

Why did those moments stand out?

What Red Flags Did You Hear?

Did you notice generic, rehearsed responses?

Had you heard that type of response before in partner interviews?

What Signaled Credibility?

Which questions revealed more detailed information?

Where did you uncover hidden assumptions about your organization, your students, or your business?

What Would You Do Differently: If you interview potential partners tomorrow which questions or question openers would you add to your list, or ask differently?



Strong Questions Reveal Alignment

The goal isn't to ask the deepest or most complex question—it's to ask the question that surfaces whether your interests, values, and assumptions are genuinely aligned with your partner's.



Build Your Question Bank

Notice which questions work for you and your colleagues. Over time, you'll develop an intuition for which questions reveal the most important information in different contexts.

PRACTICE MAKES INTUITIVE

Like any skill, asking higher-order questions becomes natural with practice.

Start using the framework in lower-stakes conversations to build your confidence and fluency.

Thank you



PSwrX[®]



Handouts

Sample Question Openers

Use this framework as a reference guide during vendor conversations. Notice how each order builds on the previous one, creating a progression from surface to substance.

1st Order: Credentials & Experience	2nd Order: Trends, Market Knowledge	3rd Order: Approach & Accountability	4th Order: Assumptions & Dependencies
"How did you end up working with your first charter school?"	"What trends are reshaping this market?"	"When we disagree, who on your team calls the shots? What role do you have in deciding how we move forward."	"How might this decision affect our business in future years / hinder us or help us?"
"How many schools have you worked with, over what period of time?"	"What was something you learned about our industry in your last project?"	"Have you ever made a recommendation against your own interest?"	"What assumptions inform your recommendation?"
"Can you share references from similar projects?"	"What experiences have you had in our sector that you haven't had or don't see in other sectors?"	"Describe your role in maintaining schedule and budget?"	"What kinds of questions do you ask of other team players to ensure we are uncovering all options?"
"Are there projects not listed on your website that would be good for us to know about? "	"Are there any policy changes affecting your work, with schools, or with charters? "	"Describe a project where your initial approach didn't work. What did you do?"	"What are the downstream effects on our operating budget that we might not see immediately?"

Spotting Answers that Demand Pausing or Probing

Even experienced leaders can be fooled by polished vendors. Listen for the signs telling you to ask more questions.

Behavior / Statement	Why It's Should Cause you to Pause / Probe
"Everyone does this."	One-size-fits-all thinking that isn't tailored to your specific context, mission, or operational constraints
"All our clients do X."	Evades specifics and suggests a cookie-cutter model rather than custom-where-necessary solutions
"We need you to decide quickly."	Creates false urgency as a pressure tactic to prevent thorough evaluation
Fast talking / jargon / acronyms	If they can only explain their work in jargon and acronyms, they will never be able to fully explain any situation to you.
"We're building that soon."	Promises future capabilities without proof; you're being asked to bet on vaporware
"You don't need to see that now."	Avoidance of documentation signals lack of transparency and potential hidden problems
"This relationship is meaningful for us. You're one of our elite clients."	Flattery designed to close the deal quickly; may hide fundamental service mismatches
"We've represented a lot of schools that look like you."	If you just met them – how can they know that? Suggests a lack of curiosity.
"We can design that later."	Defers cost risk to you; every design changes the budget. It means you don't know what you're buying or how much it will cost.
"This is how we've always done it."	Resistance to adapting to your unique mission, constraints, or operating model

Practice TIP:

- When you notice these patterns, don't dismiss the partner immediately—but do escalate your questioning.
- Use third and fourth-order questions to probe deeper. Ask for specifics, examples, and documentation.
- Genuine partners will welcome the scrutiny; problematic ones will become defensive or evasive.