Radical but Essential

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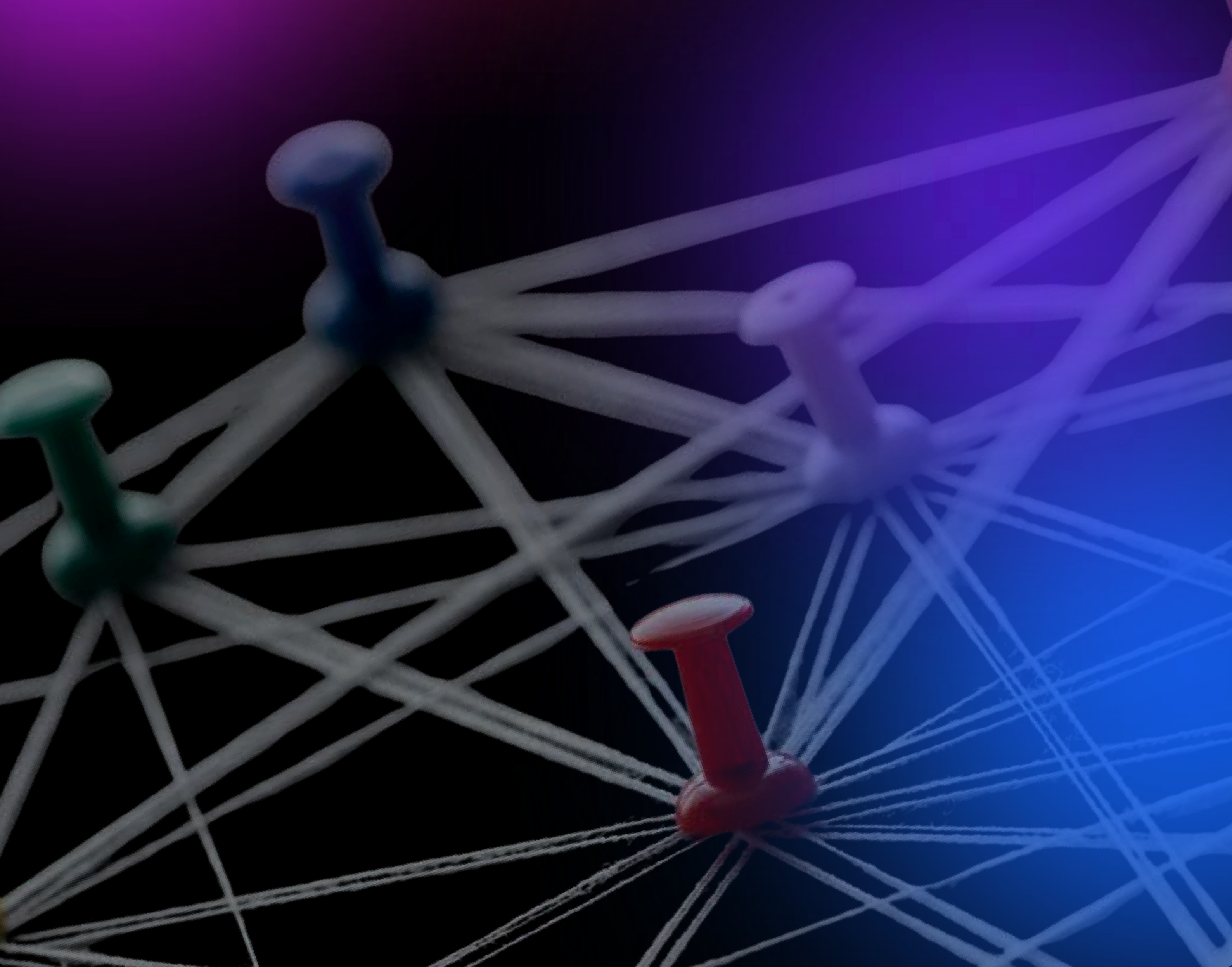
Line Manager Discovery Conversations



Introduction

Discovery is one of the most valuable stages in any performance-focused project, yet it is often the stage that receives the least time.

This guide has been created to help you to work more closely with line managers to understand real workplace performance, gather evidence, and shape meaningful solutions.

Line managers are essential partners in this work; they have context, experience, and immediate responsibility for the teams we aim to support. When we involve them well, we gain insight that cannot be replicated through training requests, assumptions, or retrospective opinions alone.

This guide outlines a practical approach to collaborating with line managers, conducting discovery conversations, planning observations, recording evidence, and forming early hypotheses. It draws on product management and product design practices, alongside established workplace learning approaches, to help L&D professionals work in a more experiment-led, evidence-informed way.

About This Guidebook

WHO'S IT FOR?

This guidebook is for L&D and HR professionals tasked with improving an area of performance within their organisation.

Whether you are brand new to Performance Consulting or have been working in the field for years, this guide will help you conduct meaningful discovery conversations with line managers to ensure you understand the reality of Performance on the ground.

The ultimate goal of this guide is to ensure that you don't end up building interventions that don't need to exist, and that the ones you do build have a significant impact on real-world performance.

WHAT'S INSIDE?

What is Discovery?
A clear definition for this important phase of work.

Line Managers as Partners
A set of principles to guide collaboration with line managers.

The Discovery Conversation Framework
A suggested structure for effective discovery conversations.

From Conversation to Hypothesis
Steps to go from a discovery conversation to your first hypotheses.

Observation as a Discovery Tool
Simple steps to set up observations as part of discovery.

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What is Discovery?

Discovery is the stage in which we seek to understand what is happening in the workplace before we commit to a solution. It involves gathering evidence, asking questions, observing work, and clarifying what good performance looks like.

In product management, discovery is used to define user needs and problems. In L&D, it helps us understand performance conditions, workflows, constraints, and the organisational context that shapes behaviour.

Experiment-led design builds on this by helping us turn early insights into small hypotheses. These hypotheses can then be tested through discovery and validation experiments, reducing risk and avoiding unnecessary investment.

Footnote: To learn more about discovery in workplace performance, see Harless, "Front-End Analysis"; Gilbert, "Human Competence"; and Cagan and Jones, "Inspired".

Working with line Managers as Partners

Line managers are busy, often balancing operational delivery, people support, compliance, and day-to-day problem solving. Effective discovery respects these pressures and creates a collaborative relationship where L&D and managers work together to understand performance challenges.

Every organisation and line manager within it is different, so it's extremely difficult to have an exact set of rules that apply to all situations. In fact, it's impossible. Instead, we should focus on having clearly defined principles that can be applied and are relevant in all organisational contexts.

PRINCIPLES FOR PRODUCTIVE COLLABORATION

- Assume good intent; line managers want their teams to succeed.
- Be clear about the purpose of the conversation: to understand, not to diagnose.
- Position discovery as a supportive activity that leads to better decisions.
- Avoid framing conversations around training from the outset.
- Ask open questions that invite reflection rather than judgement.

PRINCIPLES FOR LINE MANAGER COLLABORATION

1. Be curious rather than certain.
2. Focus on what people do, not what people are.
3. Invite managers to interpret evidence with you.
4. Keep conversations practical and anchored to real work.

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The Discovery Conversation Framework

Discovery conversations should follow a clear structure that provides depth without overwhelming the manager. The following framework supports that structure and is presented in four sets of grouped questions.

They can be explored in a single sitting or over time, depending on the time constraints of your project and the availability of the line manager.

Context and Goals

These questions establish context and expectations and surface the manager's understanding of success.

- What prompted you to reach out?
- What outcomes are you hoping to achieve?
- How will you know things have improved?

Current Performance

This helps identify variation, strengths, and patterns.

- What does good performance look like in this role?
- Where are people struggling? Can you give specific examples?
- How consistent is performance across the team?

Performance Conditions

This helps identify potential environmental factors affecting performance.

- How clear are expectations and instructions?
- Are there any tools, systems, or processes that slow people down?
- What environmental factors affect performance?
- How are errors handled?

Workflows and Constraints

This helps map the reality of the work and identifies where interventions are most effective.

- What does a normal day look like for the team?
- Where do delays or frustrations typically occur?

Common Pitfalls to Avoid

- Jumping to training as the solution.
- Asking leading questions.
- Choosing examples that confirm an existing opinion.
- Forgetting to ask about constraints such as workload or tooling.

From Conversation to Hypothesis

Discovery conversations generate a mixture of observations, opinions, examples, constraints, and questions. The goal at this stage is not to arrive at a solution, but to convert what you have learned into a set of small, clear hypotheses that can be tested safely.

A hypothesis acts as a bridge between discovery and experimentation. It captures what you think might be true and frames it in a way that can be validated with evidence rather than assumptions.

A Note on Experiment-Led Design

This guide does not explore in detail our experiment-led design methodology. But the creation or formation of hypotheses based upon discovery conversations is an early stage in that framework.

How to Synthesise Your Findings

After the conversation, take time to review your notes and pull out:

Patterns

- Do multiple examples point to the same issue?
- Has the manager described similar challenges across tasks or people?

Signals of friction

- Where do delays, errors, or workarounds appear?
- Are these consistent or situational?

Performance conditions

- What in the environment, process, tools, clarity, or consequences might be shaping the behaviour?

Known unknowns

- Where did the manager say “I’m not sure” or “I think”? These are usually excellent candidates for hypotheses.

Assumptions

- What did you or the manager assume was true without evidence? These should be made explicit.

Once you have these pieces, begin grouping them around themes such as workflow clarity, system usability, role expectations, environmental constraints, confidence, or process design.

Turning Insights into Small Hypotheses

A useful hypothesis in experiment-led design has three qualities.

It is small

It focuses on a narrow part of the performance landscape rather than trying to explain everything at once.

It is observable

You can gather evidence for or against it, ideally through observation or a simple experiment.

It is actionable

It helps you decide what to test next, even if the test is modest.

A Standard Hypothesis Format

To help keep things simple, you can use this basic format for your first hypothesis. You can then adapt this format as needed to fit your context and organisational requirements. Remember, the right format is the format that works for you.

We believe that...
Which results in...
We will know this is true if...

Examples of Well-Formed Hypotheses

Below are some simple examples of well-formatted hypotheses that could replace common assumptions made by learning and development functions.

Instead of:

“We believe people need training on the new process.”

Try:

We believe that team members are making avoidable errors because the new process is not documented clearly.
This results in inconsistent execution and increased rework.
We will know this is true if observations reveal variation in how staff complete the same task and if staff report uncertainty about the steps.

Instead of:

“Onboarding just isn’t working.”

Try:

We believe new starters struggle in their first two weeks because early tasks are not sequenced from simple to complex.
This results in higher dependency on senior staff for basic tasks.
We will know this is true if shadowing shows new starters encountering unnecessary cognitive load in their first few days.

Observation as a Discovery Tool

Observation provides insight into what people do, not what they think they do. It is one of the most reliable ways to understand processes, constraints, and environmental factors.

But how do you work with line managers to set up effective observations? How do you conduct them? And what do you look for in your notes afterwards?

Planning the Observation

Thoughtful planning ensures the observation provides meaningful insight rather than becoming a general audit of the working day. This planning should be done in partnership with the line manager so that the activity is purposeful, respectful of people's time, and aligned to real operational needs.

Agree the Purpose of the Observation

Be clear with the line manager about why you are observing. A shared purpose focuses attention and prevents the observation drifting into broad, unfocused note-taking.

Identify Who Should Be Observed

Choose individuals who will give you a representative view of the work. This should be a deliberate decision made with the manager, not a matter of convenience.

Select the Tasks or Moments to Observe

Agree which parts of the workflow will reveal the most useful information. Focus on tasks where performance varies or where friction is likely to appear.

Choose When the Observation Should Take Place

The timing of an observation shapes what you see. Discuss with the manager when the work is most reflective of typical conditions.

Prepare the Person Being Observed

Ensure the individual understands that the purpose is to learn about the work, not to evaluate their performance. A simple, transparent explanation helps reduce pressure and keeps the environment natural.

Golden Rules for Effective Observation

All observations are different, shaped by the observer, the observed, the context, the environment, and many other things. But these five golden rules should always be applied.

Do not interfere with the work

Your presence should not change what the person does. Avoid stepping in, correcting, or helping unless safety is at risk.

Do not interrupt with questions

Let the task unfold naturally. Note questions as they arise and ask them afterwards, not during the work.

Record what you see, not what you assume

Focus on observable actions, not interpretations. Describe behaviour, tools used, steps taken, and conditions present.

Watch for workarounds and friction points

Look closely for delays, shortcuts, repeated steps, or improvisations. These often reveal more about the real workflow than the documented process.

Pay attention to the environment as well as the individual

Notice interruptions, system behaviour, layout, noise, and tool availability. Performance is shaped by context, not just skill.

And That's It!

DISCOVERY IS NOT AN ADMINISTRATIVE STEP; IT IS THE FOUNDATION OF EFFECTIVE PRACTICE.

When we take the time to understand real work, involve the people closest to it, and gather evidence before committing to a solution, we give ourselves the best chance of improving performance in a meaningful way.

Line managers are essential partners in this work. They hold context that L&D rarely sees on its own, and their insight shapes our understanding of what good performance looks like in practice.

Observation, when conducted carefully and respectfully, remains one of the gold standards in understanding performance and measuring meaningful change. It shows us not only what people do, but what the environment makes possible.

As you reflect on your practice, consider how you engage with line managers, how you plan and conduct discovery, and where small changes could deepen your understanding. A more intentional, evidence-informed approach strengthens your relationships, sharpens your decisions, and helps ensure that the solutions you design address the realities of the workplace.

Be bold, be useful, be evidence-informed, and experiment-led.

About Evolve L&D

Founded in 2018, Evolve L&D is your partner in moving towards evidence-informed practice and experiment-led design.

We believe that the L&D function of the future will be uniquely placed to unlock the incredible human potential of the workforce. Supporting organisations in embracing the latest technologies whilst cultivating vibrant, diverse, and forward-looking cultures.

We work with organisations around the world to upskill their L&D function and make this potential future a reality. Regardless of size or budget, we empower the teams that we work with to embrace change, deliver value, and step boldly into the future of our industry.

Your Notes

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