

# Pre-Mortem Guidelines

## A FEW RULES...

- ▶ Set aside at least 90 minutes of uninterrupted time.
- ▶ All stakeholders should be present.
- ▶ For maximum effectiveness, the pre-mortem must be a face to face meeting.

## REQUIREMENTS

- ▶ Flip chart sheets
- ▶ Post it notes
- ▶ Ballot cards
- ▶ Timer

## NOTE

Re-assure participants that this is an opportunity to reflect on their collective experience and to voice concerns that might otherwise go unaddressed until it's too late.



The Pre-Mortem was originally created by Gary Klein. What follows is an adaptation for using it in a planning context within BUYERnomics.™

## How to conduct a pre-mortem in planning?

#1 Facilitator to draw and write the following on a flip chart

Here Lies... [Insert Name of Plan here]

Goal	What Went Wrong?
<b>Options</b> [insert here the 5 highest scoring options]	
1.	
2.	
3.	
4.	
5.	

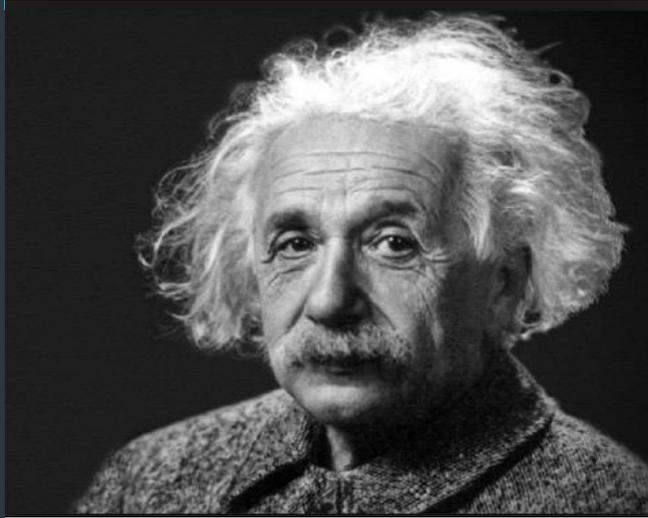
Pre-mortem exercise is credited to Gary Klein. Adapted here by The Fusebox. ©2019



## What are some of the benefits?

- ▶ It's very easy to do.
- ▶ Helps teams identify potential problems early on without being stigmatised for being negative
- ▶ Reduces the attitude of moving ahead despite the risks by someone who is over invested in the plan
- ▶ Sensitises the team to pick up early signs of trouble once the execution of the plan gets underway
- ▶ Large benefit, low cost

Unlike more formal risk analysis, the pre-mortem asks team members to directly tap into their experience and intuition, at a time when it is needed most, and is potentially the most useful. That is, before agreeing a way forward and committing resources to a plan.



“If I had only one hour to save the world, I would spend fifty-five minutes defining the problem, and only five minutes finding the solution.” [Albert Einstein](#)

**#2** Facilitator to open up with an update on the plan and the key options under consideration.

**#3** Then facilitator to challenge the team to step back from their day job and think about only the plan in hand. Imagine the worst. The plan was a complete disaster. Our options didn't get us to the GOAL. Ask yourselves - what went wrong? What made these options fail?

**#4** Working individually, team to write down in post it notes as many ideas of failure as they can think of.

**#5** Ask each participant to score their ideas where 6 = the greatest, most threatening and 1 is the least.

**#6** Once everyone has had the opportunity to post on the wall and discuss their ideas, facilitator to (1) move aside all the ideas that are external factors and therefore beyond their control, (2) combined the ideas that are repetitive and (3) have the team re-evaluate the remaining ideas.

**#7** Facilitator to hand out 3 ballot cards to each participant and ask them to vote on their top 3 from the wall.

**#8** Then, starting with the #1s, the facilitator takes one failure idea at a time, and works with the team to: (1) Create a proactive solution for it (best for problems facing you now), or (2) Define a backup plan (best for problems that could happen, but not as likely). Depending on the time available and the energy levels in the room, you might choose to move on to cover the #2s and so on.

**#9** The actions should be agreed by the entire team, including a timeline and assigning one individual in the room to own the action. This is the Way Forward in GROW.

**#10** Following the session, and no later than 2 days, incorporate the action points into the plan and distribute the revised plan to the entire team.

