

Pre-Mortem Exercise¹

Explanation: The idea of a Pre-Mortem is to identify key vulnerabilities in a plan ahead of time, “When it is early enough to still do something about them?” It can be valuable for a team to ask itself: “How might our plan or vision get sidetracked?” Or, “What are the ways this dynamic might get off kilter?”

The Pre-Mortem exercise provides a format that supports constructive criticism of plans or visions, and encourages full input from all members of the group. It allows planners to take a fresh look at their plan or vision, from a different perspective.

With a Pre-Mortem, your task is to try to anticipate potential vulnerabilities in a plan or vision. The intent is to uncover flaws and areas of concern that might otherwise be ignored or swept under the rug. When you are finished, you can try to find ways to counter these weaknesses, or to prepare the team for them. Just because a plan or vision has weaknesses does not mean it is a bad plan. But good planners should anticipate potential vulnerabilities, and take steps to address them before they become a reality.

Method:

The Pre-Mortem begins after a plan of action or vision has been determined by the team.

Step 1: The leader asks the team to envision that they are at the end of the team’s lifecycle or at the end of the mission/project/task. In this envisioning process, however, the leader asks the team to envision that the plan or effort has resulted in a total failure. Things could not have gone any worse. The group is asked to consider and identify what might have contributed to this failure.

Sample dialogue: *Imagine you are looking into a crystal ball... it is six months from today...and it is clear to everyone (team members, external stakeholders, the Commander, unified action partners) that this team is an embarrassing failure. Throughout the six months, this team has continuously struggled to work together effectively and to produce anything of value to the Commander and other stakeholders. The team has not made any progress in getting its arms around the problem. The team is not gelling; the level of trust is abysmal. Your team has suffered from consistent infighting and subversion by some team members. Team members are fed up and tired. By all accounts, this team has failed to achieve its mission.*

Why are we in this state of affairs? What has contributed to our overall failure as a team?

Step 2: The leader asks the group to spend five minutes independently writing down all the things they believe could have contributed to this disappointing state of affairs.

¹ Klein, G. (2009). Performing a project premortem. *Harvard Business Review*. Retrieved from <http://hbr.harvardbusiness.org/2007/09/performing-a-project-premortem/ar/pr>

Step 3: When each member of the group is done writing, the leader goes around the room, asking each team member to state one item from his or her list.

As an item is described, the facilitator records it on a whiteboard or flip chart for everyone to see. The facilitator then asks if any other team members had the same item on their lists. If so, the leader tallies the number of responses for that item.

This process continues until every member of the group has revealed every item on their lists. The instructor should now have a list of the group's concerns.

Step 4: It is important not to just end the exercise with the generation of the list of vulnerabilities and concerns. It is important to go a step further and discuss as a team how these vulnerabilities might be avoided or mitigated. As part of this discussion, the team leader may have the team revisit their agreed upon norms, desired team dynamics, and team mission/goals and ask the team to consider how they may want to modify these items to account for the identified concerns.

The final step is to record any action items that come from the discussion about how vulnerabilities to the team's plan or vision might be mitigated or altogether avoided.