



RED TEAMING

PRE-MORTEM EXERCISE

Leverage inclusion to improve business performance.

Pre-Mortem Exercise

Pre-Mortem is a liberating structure that facilitate uninhibited discussions and creativity in an effort to solve problems or explore new opportunities. Carrying out a Pre-Mortem exercise with your team will allow you to:

- Leverage diverse perspectives to identify the most consequential causes or reasons for failure for an upcoming project, strategy, product, or event.
- Evaluate which of those causes and reasons are currently ongoing and must be modified and stopped far in advance.
- Participants will walk away from this exercise with four or five causes or reasons that could lead to the failure of an initiative, which can then be addressed in further discussions.

MATERIALS AND LOGISTICS

A Pre-Mortem exercise is best done early in the planning stages, or well in advance of an upcoming activity, to be useful to correct the project, strategy, product, or event. We would recommend no more than 30 participants take part in this exercise; anymore and you risk overlooking quieter voices within the group. We also recommend that participants should consist of a mix of people across different teams or levels to ensure a variety of perspectives.

PREPARATION FROM THE SENIOR LEADER

For a Pre-Mortem exercise to be successful, you must have a specific project, strategy, product, or event to be analyzed. As a leader, the following questions can help you identify the issue that should be subjected to the Pre-Mortem exercise.

- Have you pressure-tested your own strategy or plan?
- Do you have an important upcoming product, plan or event that needs to be critically evaluated?
- Do you believe your team understands and agrees with all aspects of a strategy or plan? (They don't, and it is worth hearing their perspectives sooner rather than later.)

Once identified, the initiative to be analyzed should be written down (no more than one page) and shared in advance amongst all participants so they come into the exercise with a shared understanding of the issue.



Instructions

TIME	SCRIPTING
20 MINUTES	<p>INTRODUCTION & EXERCISE DESCRIPTION</p> <p>Emphasize that you have no vested interest in any outcome of the exercise, and that the participants, collectively, are doing the real work of identifying and evaluating the critical risks. You only want to improve the existing plans or operations.</p> <p>Summarize the project, strategy, product, or event that will be subjected to the Pre-Mortem exercise and ask if it is clear to everyone.</p>
10 MINUTES	<p>EXERCISE EXECUTION</p> <p><i>Ask participants to:</i></p> <ul style="list-style-type: none"> Imagine some point in the future—one week, three months, a few years, or the day after an event—where the initiative has failed. Spend no more than three minutes to write-down all the causes or reasons that the initiative failed. After they have written out their causes or reasons, tell them to first identify a criticality score of each cause or reason (on a scale of 1 = unimportant to 5 = load-bearing) and write it under the “C” column. Now tell them to identify a probability estimate for each cause or reason (on a scale of 0% = impossible to 100% = definitely will occur) and write it under the “P” column. Emphasize that every cause or reason should have a criticality score (1 to 5) and a probability estimate (0% to 100%).
15 MINUTES	<p>DISCUSSION AND WRAP UP</p> <p>Ask participants to share what they wrote down with the group—focusing on those that they assigned a “4” or “5” criticality score, or a 50% or more on the probability estimate.</p> <p>The facilitator should write down the causes or reasons on a whiteboard or flip chart. Group them around themes: internal (leadership, culture, behavioral, ethical, moral implausible goals), and external (economic downturn, customer rejection, regulatory response, malicious activity).</p> <p><i>Questions to ask during this process include:</i></p> <ul style="list-style-type: none"> Are you presently doing these things, or are these behaviors prevalent? Why? Are there early warning indicators that could hint at these occurring? Are you tracking them? Could you? What would be required to stop or modify these things? Why aren't, or won't we, they be stopped or modified? Can you do anything to alter the causes or reasons that are external? <p>Using a show of hands (or 3X5 cards if anonymity is required), the group votes on the top five causes or reasons for failure that they have identified, which must be stopped or substantially modified. These five causes or reasons are captured in a concrete sentence and written out on the board by the facilitator.</p> <p>Ask the group to pause and reflect upon what they accomplished collectively over the past 45 minutes and tell them to review all of the causes and reasons that their initiative might fail.</p>

Worksheet

CAUSES AND REASONS FOR FAILURE:	CRITICALITY:	PROBABILITY:

McChrystal Group

McChrystal Group assesses, equips, and connects your teams to outpace your environment, your competitors, and your next challenge. We do this by applying our Team of Teams framework to three critical areas of performance: developing your leaders, implementing strategy, and measuring your organization's performance.