

THE PRE-MORTEM GUIDE INSTRUCTIONS

DETAILED INSTRUCTIONS FOR USING THE TOOL

01 Set the Scene

Start by identifying a project, deal, or initiative that didn't go as planned. This could range from a total failure to a result that fell short of expectations.

02 Describe the Failure

In a few sentences, summarize the outcome. What went wrong? What was the impact?
Be specific.

03 Identify the Key Moments

Using the guide, list the major decisions, assumptions, and actions taken from the start of the project to its failure.

04 Backtrack Step-by-Step

For each moment, ask:

- What was the rationale at the time?
- Were there any warning signs or doubts?
- What alternative action could have been taken?

05 Root Cause Analysis

Use "Why?" questioning (at least 5 levels deep) to uncover deeper causes of the failure, not just surface-level issues.

06 Highlight Preventable Mistakes

Mark which problems were foreseeable or avoidable with better planning, communication, or foresight.

07 Create a "Prevention Plan"

Translate your insights into actionable strategies you can apply in future projects. Include:

- New questions to ask during planning
- Triggers for course correction
- Specific warning signs to monitor

08 (Optional) Group Debrief

If used in a team setting, invite participants to share their takeaways and discuss changes to processes, roles, or communications.