

Pre-Mortem Planning Guide: Stress-Test Decisions Before They Break

In an unpredictable world, the most resilient leaders don't wait for failure to happen—they anticipate it. A pre-mortem is a proactive strategy tool that helps teams surface hidden risks, challenge assumptions, and strengthen decision-making before critical choices are locked in.

This framework equips leaders and risk professionals with a practical, step-by-step approach to running pre-mortem workshops—turning hindsight into foresight, and uncertainty into opportunity.

Use it to stress-test your strategy, align your team, and lead with clarity—even when the path ahead is unclear.

Part 1: Step-by-Step Framework – *How to Run a Pre-Mortem Workshop*

Objective:

Help teams anticipate failure *before* it happens by assuming a hypothetical failure has occurred—and working backward to uncover risks, blind spots, and hidden assumptions.

Step 1: Set the Stage

Goal: Define the project and frame the pre-mortem exercise.

- Choose a facilitator.
- Describe the project or decision under review.
- Set the timeframe: “It’s six months from now. The project has failed badly. Let’s explore why.”
- Emphasise psychological safety—this is about insight, not blame.

Step 2: Individual Reflection – "What Went Wrong?"

Goal: Encourage unfiltered input from participants.

- Give each participant 5–10 minutes to write down as many reasons for failure as they can think of.
- Prompt with categories: Strategy, People, Culture, Systems, External Factors, Assumptions.
- Encourage stretch thinking (e.g. "What's something no one wants to say aloud?")

Step 3: Group Sharing & Thematic Clustering

Goal: Spot commonalities and patterns.

- Each person shares 2–3 high-impact failure reasons.
- Group similar risks together on a whiteboard, Miro board, or flipchart.
- Name key themes (e.g. "governance gaps", "misaligned incentives", "poor stakeholder mapping").

Step 4: Hidden Assumptions and Early Warning Signals

Goal: Dig deeper into what was missed or taken for granted.

- What assumptions failed?
- What signals were ignored?
- Which stakeholders or voices weren't heard early enough?

Use guiding questions:

- What did we *assume* would happen?
- What *didn't* we question?
- What would a regulator or critical outsider say?

Step 5: Prioritise and Plan Preventive Actions

Goal: Turn insights into forward-looking actions.

- Identify 3–5 high-impact themes.
- For each, agree on a risk mitigation or escalation strategy.
- Assign ownership for each action item.
- Set dates for check-ins or red-team reviews.

Step 6: (Optional) Red Teaming Round

Goal: Pressure test assumptions and prepare for external challenge.

- Appoint a “Red Team” of 1–3 individuals.
- Their role is to challenge the revised plan, highlight remaining blind spots, or simulate stakeholder pushback.
- Debrief together and adapt further if needed.

Final Tip: Close the Session with a Debrief

Ask:

- What surprised you?
- What do we now see differently?
- What behaviours will we change going forward?

Part 2: Pre-Mortem Workshop Template (Fillable)

Project Details

- Project Title:

- Facilitator:

- Date:

- Timeframe for the scenario: (e.g. 6 months post-implementation)

- Hypothetical Outcome: The project has failed.

Reasons for Failure (Free-form Brainstorm)

List potential reasons for failure—assume it already happened. Think broadly:

- **Governance / Ownership**
- **Stakeholders / Communication**
- **Technology / Systems**
- **People / Culture**
- **External / Market Forces**

Thematic Clusters (Group Exercise)

- Theme 1:

- Theme 2:

- Theme 3:

Hidden Assumptions

Assumption	Why It Might Fail	Early Warning Sign

Preventive Actions

Theme	Action	Owner	Deadline

Red Team Challenges (Optional)

- Top challenge/question raised:

- Suggested revisions:

- Final changes made: