Project Pre-Mortem Meeting Guide

Objective
To get a shared clear understanding of possible risks to our project (based on lessons learned from similar projects, plus other inputs), and decide how best to avoid or mitigate those risks.

Great for any type of team

Recommended 1 hour

Works for in-person, online, or hybrid

Agenda

10% ~5 mins
Set-up
State objective of this meeting (above), and the output we need to achieve.

15% 10 mins
Potential risks
Ask everyone to captire risks. What might go wrong in this project? What would be an epic fail? What will get in the way of success? What 'elephants are in the room' that are not addressed?

25% 15 mins
Reasons for these risks
Ask everyone to capture causes. Why might these risks happen? What behaviours, processes, tools or systems would be causing them?

Which risks should we pay attention to the most? Which has the highest likelihood or severity?

30% 15 mins
Ways to avoid, mitigate and minimise
Ask everyone to capture actions to prevent or minimise these risks. What should we do to avoid each risk, or minimise the chances of it happening?

Are there any changes to anyone's responsibilities and accountabilities in the team?

If any risk does happen, how should we respond?

15% 10 mins
Next steps
Based on this discussion, who needs to do what, by when?

Where will this list of risks and strategies live, so we can all refer to them?

A project pre-mortem is like a post-mortem, but done at the beginning of a project. As they say, prevention is often better than the cure, and the spirit of this meeting is to unearth possible traps, risks and gotchas that might happen in the project.

This is a great opportunity for the whole group involved in a project to be more engaged and involved, not only at the level of their own job and responsibilities, but also at a broader level, where they get to think about the project truly as a team.

Inputs
If your group has done a retrospective session recently (or any kind of post-mortem or project review), that information would be a useful input to this meeting. Also, it's essential that the purpose of the project itself is well understood beforehand.

Preparation
Help everybody who is coming to this meeting to prepare by asking them to think about what could have gone better in pervious projects they have been involved with. If there is any information available about the project's intent, previous retrospective outputs, ask your group to read this material as well.

TIP: Help your group to focus only on the risks within their control. If any risks arise that are pulling the discussion into a rabbit hole, help the team to at least acknowledge it, classify it as 'external' rather than 'internal', and move on.

TIP: Invite a subject matter expert or two who is not part of the project group, but has been involved in similar projects, where they might have some experience and wisdom to impart. They don't need to be there the whole time, but they might agree to stick around if they can also help with potential solutions to risks.

GOTCHA: It's essential that all team members be present, as well as any stakeholders who will be involved at some point. Watch out for stakeholders who can't or won't attend. Part of doing this meeting together is the social contract it creates, in being aware of risks and commiting to being part of the solution if those risks happen.

BRIGHT PILOTS