MID-MORTEMS

A PRACTICE FOR LEARNING AS YOU GO – DON'T WAIT UNTIL IT'S TOO LATE TO COURSE CORRECT!

fail forward

MID-MORTEMS

What are mid-mortems?

You've probably heard of **post-mortems** or after action reviews where, at the end of a project, the team comes together to learn from what worked and what didn't. The trouble with waiting until the end to reflect is you've run out of time to do anything about it! As such, we often don't take the time to do these post-mortems because we've already moved on to the next thing.

Pre-mortems, while wildly underused, have been a great addition to this practice. Instead of waiting until the end of a project, pre-mortems get the whole team together before the project launches to imagine themselves in a future where the project has become an *unmitigated disaster*. Each person in the meeting then works together to generate plausible reasons for what caused it to go so badly[1]. This approach invites candor, allowing team members to raise dissenting views, and identify likely failure modes without being perceived as pessimists, naysayers, or otherwise disloyal to the project. Most importantly, it means risks can be mitigated while there is still time.

But despite its obvious benefits, most people don't use pre-mortems either. We're often wrapped in optimism at the beginning of a project so it doesn't occur to us to consider all the ways it might go wrong.

Thus enter **mid-mortems**, a practice that combines post- and pre-mortems and is done at regular intervals (usually once a month) throughout an initiative – when the reality of implementing the project has set in, but before it's too late to change!

The actions coming out of a mid-mortem are to be done right away and reviewed at the next mid-mortem, making it effective for short-cycle learning and improvement, similar to an agile or sprint retrospective[2] but truly focused on the hard conversations about what has and might go wrong, and how to adapt and improve going forward.

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[1] https://hbr.org/2007/09/performing-a-project-premortem

[2] The twelfth and final tenet of the Agile Manifesto is, "At regular intervals, the team reflects on how to become more effective, then tunes and adjusts its behaviour accordingly."

Why?

When things are going well, we attribute the success to our brilliance and don't question what we might learn. But when they're going poorly, we tend to attribute the failure to factors out of our control and move on as quickly as possible. The truth is, no matter how well things are going, there are always opportunities to improve. And no matter how much a bad result is out of our control, there are still things we can do differently.

Mid-mortems create a regular practice of checking in on the big picture of how an initiative is going, learning from the successes and the failures, and identifying future risks, so we're better prepared for what lies ahead.

They are short, high-value check-ins that increase trust, candour and performance of the team by making it the norm to identify and speak openly about what is and isn't working, and take action to continuously improve.

When?

Use this exercise on any project or initiative of significance, especially when it's imperative for that project to be a success. That said, mid-mortems can also be used as a regular way for a team to check-in on what is working and what isn't, even when there is no big project on the go.

Weekly, monthly, quarterly, you decide the cadence that makes the most sense for your team or project. If things are fast moving, more frequent is better. If things are fairly stable, quarterly might be best. The important part is to keep the meetings short (try for one hour or less), and to schedule them in advance.

Mid-mortems should not be prompted by something going wrong (as we might do with a post-mortem). A meeting in reaction to a failure makes those invited feel defensive, and their focus will be on avoiding blame, not learning. By scheduling mid-mortems, they become a part of regular business, implicitly saying we will focus on the learning in both good times and bad. Plus, doing a bunch of mid-mortems when things are going well builds the learning skills and trust needed to have the more difficult conversations when things aren't going so well.

Who?

Bring your core project team together. And depending on how big and important the project, consider inviting partners (IT, legal, support, marketing, security, etc.) to encourage different perspectives and think past the obvious. That said, if only a few people can make it, do it anyway! It's better to do these short meetings regularly and see value from them than to try to get everyone together for a long retrospective that happens only once!

How?

Assign a facilitator – The facilitator is often, but not necessarily, the project leader. Regardless, it should be someone who is able to guide the conversation without becoming emotionally involved, so it may be worth considering someone who is not a member of the team.

INTRODUCTION

State the purpose of the mid-mortem – "We are conducting this mid-mortem because we as a team have a shared interest to learn and continuously improve. The goal is to identify risks and course correct our work going forward." As humans, our natural tendency is to protect ourselves and not question team decisions. You want your team members to have high confidence in the fact that if they share an idea or bring up a mistake, it will be well received.

Establish team norms – Invite participants to share principles for how they would like to engage with each other by asking, "What norms will help you stay true to the goal of learning, and create the conditions for you to fully participate?"

The following norms are especially important for every mid-mortem, and should be brought up by the facilitator if they are not mentioned by participants:

1. We will focus on being utterly blameless. Therefore we look at what happened – and especially how it happened – never blaming.
   Because learning from the experience as a *team* is all that matters, the 'who did it' is irrelevant.

2. Regardless of what we discover, we know that everyone is doing the best job they can, given their experience, the resources available, and the situation at hand[3].
3. Everyone participates because everyone has unique ideas and perspectives to share. No one dominates or interrupts.
4. Every contribution is considered equally. There are no right or wrong answers. Follow up questions are welcomed but debate and critique of the ideas and perspectives of others are not.
5. We agree to respect the time allocations in the agenda (E.g. 10-minute Intro, 20-minute Look Back, 20-minute Look Forward, 10-minute Actions) to ensure the meeting produces more value than the time it takes.

Participants review (and, if needed, adapt) their team norms at every meeting, and then agree to abide by them.

Review actions items from the previous mid-mortem – You want your team to use the time between mid-mortems to reflect on learnings, identify opportunities to improve and be accountable for those next steps. Therefore, every mid-mortem after your first one should start by holding team members accountable for actions agreed to in the last meeting.

LOOK BACK (A.K.A. THE POST-MORTEM)

There are four main questions to answer when looking back:
1. 'How did it go?'
2. 'What did I learn?'
3. 'What did we learn?'
4. 'What can be improved and how?'

Invite each participant to use the attached Look Back Worksheet to do some individual reflection and take notes before the group discussion starts.

1. **Ask, *"How did it go?"*** Some additional useful questions include:
   - What were our intended outcomes? How do those compare to our actual results?
   - What caused our results? (Keep asking, "What caused *that* to happen?" until arriving at the deeper story behind the story.)
   - What was your highest point (emotionally) since the last mid-mortem and what was your lowest point?

[3] https://retrospectivewiki.org/index.php?title=The_Prime_Directive

Going around the table, each person is invited to share only one new (i.e. hasn't already been said) idea/reflection/perspective at a time before moving to the next person. This ensures everyone participates equally. The team leader shares first, role modeling humility, brevity, and candor, thus setting the tone for the discussion.

Remind participants to be as specific as possible when sharing their stories to avoid generalizing comments. This means staying away from comments like, 'We could have communicated better,' and encourage specific stories of process: What happened? When?

And finally, don't forget to thank each person for the insights they contribute to the discussions.

2. **Ask, *"What did you learn?"*** and invite participants to take a few minutes to reflect individually on their own actions and learnings[4]. Some additional questions that may be useful for participants include:
    - What did I do, or not do, to contribute to those results?
    - What caused me to act that way? How did I arrive at my decisions?
    - What prevented me from acting sooner?
    - Do I notice any habits or trends in my behaviour?
    - How am I better, stronger, wiser for this experience?

3. **Ask, *"What did we learn?"*** Some additional useful questions include:
    - What worked really well, and what wasted our time?
    - What were our key decisions and actions and how might they have been improved?
    - What does this experience cause us to question or think differently about?
    - How is the team better from this experience?

    Again, each person is invited to share one new idea/reflection/perspective at a time before moving to the next person, thanking each person as you go.

4. **Ask, *"What can be improved and how?"*** Some additional useful questions include:
    - How will we adjust our thinking, behaviour, and/or processes going forward?
    - What is the next event to which we can apply what we are learning?
    - Who else needs to be involved?

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[4] Strive for what Chris Argyris called Double Loop Learning, where we have the courage to examine our own contribution to the failure, as well as the deeper assumptions, norms, and trends that led us to the unfavorable outcome.
https://hbr.org/1991/05/teaching-smart-people-how-to-learn/ar/1

Again, invite each participant to share one new idea/reflection/perspective before moving to the next person, thanking each person as you go. Be sure to identify and document the action items that come out of the discussion. They will be revisited at the end when compiling a list of Action Items.

Switch! Time to shift gears and start looking forward. Consider asking the group to get up, take a short break, and change seats, signifying this shift in focus.

LOOK FORWARD (A.K.A. THE PRE-MORTEM)

There are four main parts to looking forward:

1. Clarify the plan and frame the failure
2. Reflect and discuss all the reasons for the failure
3. Identify the three highest potential risks
4. Reflect and discuss actions to mitigate the biggest risks

Part 1: Clarify the plan and frame the failure

Participants will likely be familiar with the project plan before the mid-mortem meeting. However, the facilitator should address any uncertainty about what the team can expect going forward so everyone knows the plan between now and the next mid-mortem.

With that clear direction in mind, invite participants to close their eyes, get comfortable, and relax. "Imagine that a crystal ball shows that this plan has failed, catastrophically, at some point in the future, perhaps six months or a year from the time of the meeting. There is no doubt in the outcome because the crystal ball never lies – the plan has been an unmitigated disaster."[5]

Part 2: Reflect on and discuss all the reasons for the failure

Give participants just two minutes to reflect individually on all the reasons they can think of for what went wrong that resulted in the failure. Invite them to use the attached Look Forward Worksheet to take notes.

Going around the table, each person is invited to share one of the reasons they think the project failed (that hasn't been shared already) before moving to the next person.

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[5] Framing from https://capitalallocatorspodcast.com/wp-content/uploads/Klein-Sonkin-and-Johnson-2019-The-Misuse-of-Premortems-on-Wall-Street.pdf

The team leader shares first, role-modeling candor around the real weaknesses of the plan. The facilitator records all the responses.

Part 3: Identify the three highest potential risks
Come up with the three potential risks with the greatest likelihood and impact on the project. You can narrow these down with discussion or by voting. Usually people are worried about similar issues, so it might be easy to combine them into the top three.

Part 4: Reflect and discuss actions to mitigate the biggest risks
Give participants two minutes to individually write down what actions they might take to mitigate the risks. Again, each person is invited to share one action (that hasn't been shared before) before moving to the next person, with the facilitator documenting each action item.

TAKE ACTION

Combine your lists – By the end of the Look Back and Look Forward you will have two lists of actions: One with ideas for how the work can be improved, and another with ideas for mitigating the greatest risks. Bring those two lists together.

Separate the lessons from the to-dos – Help the group identify which action items are lessons or themes, and separate these out from the concrete to-dos. While not actionable, the lessons are important. Find a way to remind the group of those lessons in between mid-mortems. Now get rid of any to-dos that are just too amorphous or big to act on. (E.g. Unless you are head of HR and looking for a new project, a to-do like "redesign hiring" is useless.)

Assign ownership – For the remaining to-dos, go down the list one by one, asking the team if we will actually do this, and if yes, who has ownership over ensuring it is done (the person with ownership should be in the room). Write that person's name beside the action item. Add a due date where applicable. With ownership assigned, type up the list and add to the calendar invite for the next mid-mortem.

Close with clear improvement goals – The facilitator or team lead closes the meeting by clearly stating the goals the team will focus on between now and the next mid-mortem.

MID-MORTEMS

FLOW CHART

INTRO

State the purpose.
Review the team norms for how participants agree to engage with each other.
Review the previous action items.

LOOK BACK

There are four main questions to answer when looking back:

1. 'How did it go?'
2. 'What did I learn?'
3. 'What did we learn?'
4. 'What can be improved and how?'

SWITCH

Time to switch gears from looking back to looking forward. Consider asking the group to get up, take a short break, and change seats, signifying this shift in focus.

LOOK FORWARD

There are four main parts to looking forward:

1. Clarify the plan and frame the failure.
2. Reflect and discuss all the reasons for the failure.
3. Identify the three highest potential risks.
4. Reflect and discuss actions to mitigate the biggest risks.

TAKE ACTION

Assign ownership for action items.
Clearly state goals the team will focus on between now and the next mid-mortem.

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LOOK BACK WORKSHEET

HOW DID IT GO? • What were our intended outcomes? How do those compare to our actual results? • What caused our results? (Keep asking, "What caused *that* to happen?" until arriving at the deeper story behind the story.) • What was your highest point since the last mid-mortem and what was your lowest point?	
WHAT DID I LEARN? • What did I do, or not do, to contribute to the results? • What caused me to act that way? How did I arrive at my decisions? • What prevented me from acting sooner? • Do I notice any habits or trends in my behaviour? • How am I better, stronger, wiser for this experience?	
WHAT DID WE LEARN? • What worked really well, and what wasted our time? • What were our key decisions and actions and how might they have been improved? • What does this experience cause us to question or think differently about?	
WHAT CAN BE IMPROVED AND HOW? • How will we adjust our thinking, behaviour, and/or processes going forward? • What is the next event to which we can apply what we are learning? • Who else needs to be involved?	

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LOOK FORWARD WORKSHEET

Imagine our plan has failed, catastrophically. What are all the reasons you can think of for what went wrong and why we have failed?	
What are the three potential risks with the greatest likelihood and impact on the project?	
What actions might we take to mitigate the risks?	
My action items	

fail forward