

Consider A Strategic Planning Premortem

by Patrick J. McKenna



You are at the stage of having worked with the members of your Strategic Planning Committee (SPC) for a number of months to finally come to the point where you have a draft strategic plan that has been approved by the partners and now needs some attention directed toward how certain components will actually be implemented. There are a number of actions contemplated that your fellow Committee members feel are critical and definitely need to be properly executed in order to make a significant difference. As an example, one such action item states:

Develop and codify in writing, a set of 'Client Service Standards' that are accepted and consistently used by all attorneys in every practice area.

There is some discussion and concern amongst the members of your SPC as to how this is going to be effectively implemented. The concern emanates from a sense within the group that it has traditionally been very difficult to get lawyers to perform consistently, even so far as getting in their time-sheets on a regular basis is concerned. What to do?

As everyone knows it is common practice to conduct a “postmortem” or lessons learned session upon completion of any major undertaking. If your endeavor achieved its goal, the questions typically focus on what went right, what we did well, and how we might sustain our success. If your initiative fell short or failed to meet expectations, your postmortem efforts tend to focus on what went wrong and how we got off track.

That said, this may be a time to think about conducting a ‘premortem.’ A Premortem is a process to aid in identifying the potential roadblocks, **before** they have a chance of derailing your implementation efforts.

In a spirit of full disclosure, I confess to borrowing the term “premortem” from a *McKinsey* article entitled “Strategic Decisions: When Can You Trust Your Gut?” Not only is the article a fascinating read, it supports my belief that a good way to help ensure effective execution of your strategic planning specifics is to ask postmortem-type questions before, rather than after, the fact.

Here is how a strategic planning premortem could be preformed.

- Ask the members of your Strategic Planning Committee to assume that their draft strategic plan or some critical but contentious component of the plan (like the action item identified

above) has either failed in its efforts to be executed or has been totally rejected by the partnership.

Your instructions to the group might be: “Everyone take two minutes and write down all the reasons why you think the undertaking failed.” This exercise asks the members of your group to be self-critical, before they prepare to move forward in implementation, and gets people to voluntarily engage in devil’s advocate thinking before the specific action item even gets started.

The team members can then be given a few minutes to individually write down all the reasons they can think of regarding why the plan has failed. Your role as a facilitator would be to have each member announce what is on his / her list.

In some instances, your fellow Committee members may lack the foresight to spot shortcomings. They may be so confident that they don’t see the need for a critique. In those situations you may benefit from bringing in some objective, trusted partners to read, review and serve as devils advocates to help identify any areas of the plan that may spark contentious debates.

- Now have the SPC members then determine different ways and actions they could proactively take to prevent the implementation of the specific action item from failing or being rejected.

Ask every member of the Strategic Planning Committee to suggest at least one action that they believe could help to reduce the likelihood of the plan being rejected – including possible revisions to the plan. You may likely hear, as I did when conducting this exercise recently, a number of creative ideas like:

We could enlist a group of our more senior partners who are well-respected throughout the firm for their gifted client service abilities, as our ‘blue-ribbon panel,’ to help construct the client service standards based on the kinds of actions that they take on a regular basis.

We could gather together a group of key clients to provide input into what our client service standards might include.

We could publish the service standards on our web site and in engagement letters such that every client was made aware of the standards and knew what to expect from the lawyer serving them. This would serve as a catalyst for ensuring consistent behavior from amongst our lawyers.

Conducting a premortem can help you identify potential problems that otherwise would not have surfaced until they caused major damage to the strategic implementation efforts. This process is intended to heighten your Committee’s sensitivity to potential areas of contention and then prepare to either counteract or address those areas in a proactive manner. The goal is to prevent potential problems from occurring in order to increase the likelihood of success. For the amount of time invested, a strategic planning premortem is a low-cost, high-payoff activity.

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