

Conducting an Effective Postmortem

This guide was developed in conjunction with a post titled [“Don’t waste a perfectly good failure”](#) on NVA’s Ventures in Good Food blog. As the post explains, companies conduct postmortems to evaluate a recent failure or challenge in order to identify the root causes and minimize the chance of them happening again. But they are not only retrospective. Postmortems can also be conducted as a precautionary measure to identify risks and weaknesses in an operation that may appear to be thriving. As such they are an effective tool to use as an ongoing business practice.

As you’re planning a postmortem, use the below points as a planning guide. Consider and respond to each of the questions below. You may want to fill out this worksheet and share it with colleagues who will be leading the postmortem with you, to ensure you are fully aligned before you begin the process of organizing, planning for and facilitating the session.

Remember that this document should be used as guidance, and that ultimately, you should structure and execute postmortems in whatever way feels true and authentic to your management style and culture.

Purpose

What situation are you reflecting on and why do you consider it a failure?

What is the purpose of this postmortem?

Format

In general, live, group sessions work best for postmortems and enable people to be more honest and relaxed. How long do you want this postmortem to be and where will it take place?

How will you structure and organize this postmortem?

Attendees, Role

Thoughtfully consider who should join, and be comfortable over-inviting and including all individuals who were involved in a project. For each attendee you list, include a note on the role they played in the situation you are reflecting on. Limiting a postmortem to only key stakeholders or leaders will likely mean that some of the most important issues experienced by those doing the work may not surface. It also may inadvertently lead to a “behind the doors” feeling about the process.

Who will you invite? What role did they play?

Pre-Work for You

How will you set the stage for a successful postmortem? What data and analysis can you provide in advance? Wherever possible, share data on outcomes with the team so reflections and discussion can be grounded in the results. This may include forecasted versus actual sales, customer retention rates, cost of goods, etc.

What pre-reading and pre-work will you develop?

Pre-Work for Others

Circulate a set of questions to ensure that all attendees come organized and prepared with their reflections. Making these specific to your own efforts is critical, but several starter questions include:

- *How do you feel about the outcome of the effort? Did it achieve any of our goals? What was the most successful part of it? What was least successful?*
- *If you could wave a magic wand and change anything, what would you change?*
- *How accurately did our plan and process reflect the reality of what we experienced? What were the key differences?*
- *Did we bring on the right stakeholders, partners and manage them effectively? Who should have been included? Who should not have been included?*
- *What frustrated you the most throughout the effort?*

What reflection questions will you ask people to consider in preparation for the meeting?

Rules of Engagement

Kick off your meeting with an overview of basic communication norms to maintain a culture of collective responsibility, trust, mutual respect and continuous improvement. Rules of engagement should promote honesty, minimize finger pointing (and perhaps encourage inward finger pointing), active and respectful listening, and maintaining positivity even when discussing difficult topics. Praise specific actions of attendees when they are embodying these rules of engagement.

What rules of engagement will you set up for the meeting?

Facilitation

Identify a single person who can act as the facilitator. This person may be internal, or can be external if the group dynamics suggest that this approach would work best. Often, the facilitator is the leader of an organization or project, other times it may be the project manager or person most involved in the day-to-day operations. It is most important that this individual is skilled and comfortable facilitating what can become a difficult dialogue. In addition, there should be someone identified to scribe and synthesize the discussion, and keep track of time.

Who will be the meeting facilitator, the meeting time keeper and the meeting scribe? What will their specific responsibilities be?

Output

Output from the postmortem can be circulated to all who attended to weigh in and edit. The final output can be disseminated to the entire company, partners, funders or even the general public. This is a critical step to think through because it means that you are using the postmortem effectively – as a tool for continuous improvement. By ensuring that the insights you and your team generate are applied and that the organization or industry is constantly improving its processes and strategy, the postmortem becomes an invaluable aspect of organizational culture and a success driver for the business, and not a bureaucratic process to be endured.

How will you document and share out lessons and action items from the postmortem? With whom will you share it?