

Strategy Pre-Mortem Interview Guide

Anticipating Barriers to Success for New Strategic Initiatives

Strategy Pre-Mortem interviews help the institution identify potential barriers to successful implementation of new strategic initiatives by analyzing stakeholder experiences with similar initiatives attempted by the institution the past. Try to identify 5-10 individuals with firsthand recollections of these past initiatives. The ideal mix would include faculty and administrative staff, relatively senior leaders and front-line workers, enthusiasts, and skeptics. If you can't find individuals familiar with past initiatives, or if the new initiative is the first the institution has tried in this strategic vein, you can make the questions prospective, rather than retrospective.

High-value pre-mortem interviews help surface issues that, if unaddressed, threaten the initiative's chances of dial-moving results, and undermine confidence of experienced colleagues that the new effort will turn out differently from predecessors. This interview guide provides a roadmap for managing one-on-one conversations or small focus groups, and a framework for capturing and communicating lessons to the working group responsible for scoping the strategic initiative.

Invitations and Pre-Wiring

- Identify 5-10 interview candidates, ideally from a mix of academic and administrative roles
- Explain that they were identified due to their experience with the past initiative, and ability to provide feedback to help scope a new strategic initiative with similar goals
- Schedule interviews of 30-60 minutes

Interview Kick-Off

- Review interview goals: to learn from previous experience and set up new initiative for success
- Explain who information will be shared with, and how it will be used. Offer to keep remarks confidential and anonymized if it helps interviewee feel safe enough for candor
- Note that feedback will be carefully considered, but that you can't promise that every problem or suggestion will be addressed
- Be prepared to refresh the interviewee's memory about the previous initiative to be discussed: launch timing, name, common campus perceptions, etc.

Strategy Pre-Mortem Interview Guide (cont.)

Interview Questions:

What was your role at the time of the previous initiative?

How did the initiative affect professional routine life? New processes or recurring tasks? Changed priorities or budget?

What about the initiative worked well, from your standpoint or the standpoint of your students or unit?

What didn't work well? What were the biggest pain points or areas where the reality didn't meet the vision?

Give the conversation rein here. Let interviewees free-associate their responses, then circle back to get more exact drill-downs about pain points. Listen for these common root- cause issues:

Training: Where did you feel undertrained to perform your role well? What training or support would have helped?

Process and IT: What processes or tech tools didn't work well? What was wrong with them?

Workload: Did the initiative create unrealistic time demands? What could have been changed to free up enough time to do things better?

Cultural Buy-In, Incentives and Leadership: Where was the initiative misaligned with your culture and budget or personal incentives? Did leaders do a good job communicating and supporting the initiative? If not, why not?

Summary Question: If you could change anything about the previous initiative to help the next one, what would it be?