Backcasting (Right-to-Left Forecasting)
Why Use It – A Musing (draft)

Organizations / People
- need better
  - measurable goals
    - otherwise they
      - get lucky
      - stumble
      - die
    - straining
      - $ (dollars)
    - personal / professional relationships
      - injectable midstream in business / life
        - not overly complex
          - agnostic
          - objective
            - measurable
              - consistent
              - compatible with existing processes
              - scalable
            - communicable
              - collaborative
        - methodology
          - tasks and milestones
            - that must answer
              - why?
                - via
                  - independent review
              - how do I know?
            - that must demonstrably tie to
              - overall business / personal objectives and goals
            - that requires
              - tactics
            - strategy
              - that have
                - BA skills
                  - humility
                    - strategic planning skills
                  - organizational multi-tier cohesiveness
                    - strategy / tactics tie in
                      - that need more
                        - organization / personal goal knowledge
                          - measurable outcomes
                            - goals
                              - that require
                                - bandwidth
                                  - consistent strategy methodology
                                    - that is
                                      - what it is
                                        - history
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**Backcasting (Right-to-Left Forecasting)**

0. Identify the baseline (the current state)

2. Using an iterative process, define what must have existed prior in order for the current milestone to be met.

1. **Leadership Outcomes:**
   - Leadership attributes
   - Prospect targets
   - Client targets
   - Staff strategy

3B – Plan is too aggressive
3A – Plan is ready
3C – Plan is not aggressive enough

**Advantages of backcasting**
A. Every task is derived from an intended outcome thus the contribution that each task makes to the final outcome is known. There are no wasted tasks.
B. Gaps in knowledge and resources are identified up front before the plan is executed. There are no surprises later, providing for strong risk mitigation.
C. Areas of concern (or impossible expectations) are identified early, enabling a resetting of expectations if required.

**Understanding backcasting (right-to-left forecasting)**
A. Begin by identifying the current state (item 0) and the measurable outcomes (item 1) including dates.
B. Assuming that these outcomes occur by this date, define what milestones (item 2A) must have occurred immediately prior in order for these outcomes to have manifested.
C. Assuming that item 2A has occurred, define what milestones (item 2B) must have occurred immediately prior in order for 2A to have occurred.
D. Assuming that item 2B has occurred, define what milestones (item 2C) must have occurred immediately prior in order for 2B to have occurred.
E. Repeat process until all milestones and tactical requirements have been defined. You will now have a project start date and a plan with milestones.
F. Review plan for opportunities and risks.
G. If the start date is close to today’s date (item 3A), then one has a plan to execute by flipping the timeline in reverse, running it forward towards the measurable outcomes.
H. If the start date is significantly prior to today’s date (item 3B), then the outcomes are too aggressive and require more time to implement then the defined outcome date permits. In this case, either push the date back or make the outcomes less aggressive, reducing the size or number of them.
I. If the start date is significantly in the future (item 3C), then the outcomes are not aggressive enough. In this case, either pull the date closer to today’s date, add additional outcomes or expand upon existing measurable outcomes.

**Diagram**
- **Drives:**
  - Life Purpose
  - Corp. Vision
  - Corp. Mission
  - Customer Needs
- **Technologies Attribute**
- **Verticals**
- **Other**
- **Prospect Targets**
  - Attribute 1
  - Attribute 2
  - Attribute 3
- **Prospects**
  - Prospect 1
  - Prospect 2
  - Prospect 3
  - Prospect 4

**Items omitted for clarity purposes**
- Subset shown as example

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Defining Measurable Outcomes

On a whiteboard using post-it notes, brainstorm potential set of goals, aims, outcome indicators, aspirations, mandated requirements and critical success factors.

- Purpose statements should begin with a verb (obtain, produce, create, show, demonstrate, etc)
- Each statement should describe a single purpose only

Arrange the post-it notes to create a causal network or hierarchy.

Show how purposes are linked by inserting arrows to indicate the direction of causation, influence or support (the arrows go from a means to an end or from an action to an outcome).

Decide which is the primary purpose / measurable outcome and which ones are supporting / secondary purposes / measurable outcomes.

Multiple primary purposes / measurable outcomes will create dilution of effort or confusion in strategy / execution.

Make sure measurable outcomes have dates and quantifiable data (e.g. revenue, number of customers, etc).

The brain cannot move towards goals in specific, demonstrable, consistent ways (especially with multiple team members) unless the outcomes are measurable and have no areas of ambiguity.
Defining Measurable Outcomes

A Different View

**Define Purpose / Mission / Vision**
- Define the purpose, mission and vision (overall),
- What do we want to accomplish?

**Define Measurable Outcomes (MO)**
- Define the measurable outcomes that, if achieved, will allow the purpose, mission and vision to be accomplished.
- How will we measure it?

**Backcast (conceptual BHAG)**
- Begin with the measurable outcomes and move backward to the present state.
  - Can we accomplish it?
  - How do we accomplish it: Primary choices, Secondary Choices, Fundamental Choices
  - With whom?
  - What do we need?
  - When and in what order?

**MO Achievable?**
- If No is a consistent answer here, then Purpose needs to be revisited. Flowchart does not contain an explicit evaluation of Purpose on a No since it produces too much “naval gazing” regarding Purpose. However, infinite No selections suggest Purpose may not be achievable and needs to be reviewed.

**Accomplish Purpose?**
- Yes
  - Publish Backcast

- No
  - Purpose Still Realistic?
    - Yes
    - Backcast
    - No

**Choices:**
- Primary – choices that produce specific, measurable results
- Secondary – choices that influence / contribute to primary choices
- Fundamental – state of being or state-of-existence choices, not subject to external influence / circumstances

Knowing where we are is as important as where we need to go. Asking for directions to Penn Station in NYC will require different directions depending on whether we are in Manhattan, are in Seattle or are in London, England and will require different resources and different time to execute.

Reflection Questions
- Where do we go?
- What do we do?
- What do we say?
- ... and to Whom?
- What quality do we seek?
- What quality do we create?
- Who should we be?
- Who are we being?
Backcasting (3D Representation)

A) Awareness / Visioning
B) Baseline Mapping
C) Creative Solutions
D) Decide / Confirm Priorities

Journey Status

- Late
- Slow
- On Track
- Ahead of Schedule

Potential Issue

Sprint Status:
- Late
- Slow
- On Track
- Ahead of Schedule

Observer vantage point

Money

Knowledge

People

- Leave / Expend / Share
- Arrive / Earn / Acquire
- Go / No Go Checkpoint

Conditional shortcut / express path

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Scoring the Backcast

Four Primary Elements

25%
- Awareness / Visioning

25%
- Baseline Mapping

25%
- Creative Solutions (Backcast)

25%
- Priority Selection

100%

One Point For Each (16 total)

Critical Thinking Criteria

- Argument
- Bias
- Context, time and place
- Diagramming
- Evidence
- Fallacies

Scored Using

Choice Avoidance Criteria

- Choice by limitation
- Choice by indirectness
- Choice by elimination
- Choice by default
- Conditional choice
- Choice by reaction
- Choice by consensus
- Choice by adverse possession
- No choice by excessive permutation
- No choice by over-processing
Life Has Many Dimensions That Must be Factored In

Each dimension / slice is backcast separately but with awareness of other dimensions / slices including resource needs, complementary or detraction opportunities, etc. For example, acquiring knowledge may require expending finances, spending time away from relationships, etc.

For every week / month / quarter (or other level of granularity), make sure that the sum of the effort across all dimensions for that time period can be accomplished within the timeframe, otherwise the goals for some slices will need to be adjusted. It is not enough to defer effort within a dimension / slice to another time period because it means that that time period will likely be overloaded in regards to effort.

Ignoring or not defining a dimension will ultimately cause defined dimensions to fail, since the undefined or ignored dimensions will still require attention and effort, detracting from the effort noted for defined dimensions. Reality doesn’t care what you hope or think or what you choose to ignore.