

# FIRST 100 DAYS XO/S3 HANDBOOK



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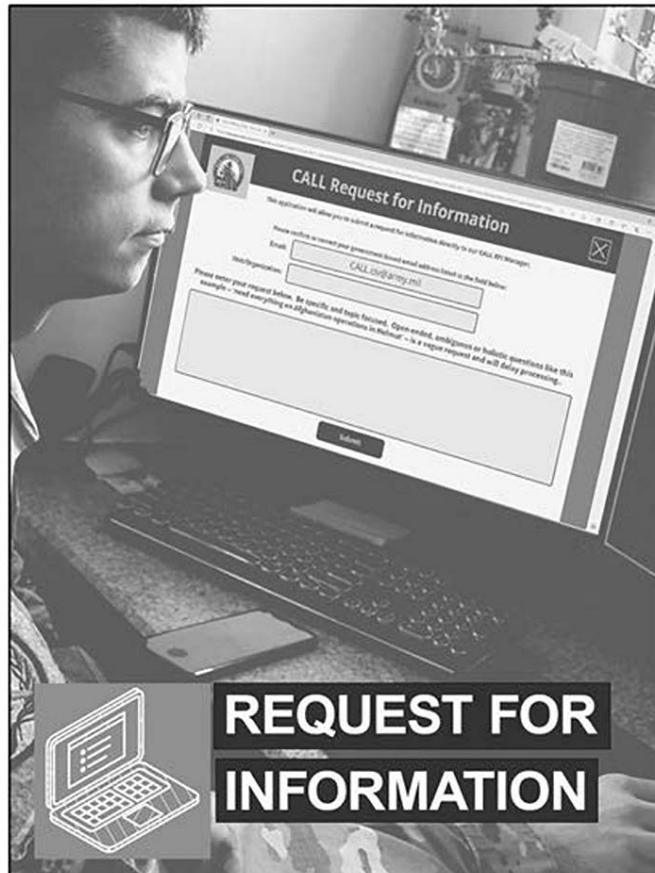
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## REQUEST FOR INFORMATION

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## Foreword

Great battalions have great systems. They execute the routine things well, integrate into division and brigade priorities, and invest in their people. Great field grade officers are a vital component of great battalions. They are the *Iron Majors* that run our staffs while the colonels command. In your first 100 days as an executive officer (XO)/S-3 you establish the foundation to develop systems, anticipate problems, and enable your commander to make informed and deliberate decisions. Although the two positions have very distinct roles, they have much in common. Serving as the commander of the National Training Center for three years, I observed XO/S-3s with varying degrees of experience whose energy, emotional intelligence, and ability to establish and govern process were decisive to their battalion's performance in the fight.

In my experience, high performing XO/S-3s exhibit five key characteristics:

- They align organizational energy to meet their commander's intent.
- They build and sustain networks of trust across all branches, tribes, and units that enhance their formation.
- They enforce disciplined execution of established processes for routine actions.
- They develop and empower their subordinate leaders.
- They keep the battalion aligned with brigade priorities.

The only thing harder than being a battalion field grade is working for one. XOs and S-3s must remember they still have a vital leader development role that starts with certifying and empowering their staff. The battalion staff is young, and the demands are high. Empowering that staff requires more than handing off a task and suspense. Instead, XO/S-3s must invest in training their teams, building in a feedback loop that provides the necessary structure to enable the staff to properly analyze, assess, and provide recommendations to their commander. Staying positive in the face of setback and adversity is a huge part of the job and will foster a positive climate for subordinate leaders to exercise the proactive initiative that is essential on the battlefield.

Lastly, XOs and S-3s must generate the organization's energy in line with their commander's intent. Time is a finite resource. Organizational energy spent on tasks not in line with your commander's intent must be ruthlessly culled from the weekly task list. The demand on your organization will already be significant and there will always be more to be done. However, it is the XO and S-3's job to prioritize the tasks that will support their commander's intent.



This Center for Army Lessons Learned (CALL) publication covers additional insights and perspectives that are crucial for every XO and S-3 to understand. I had the privilege to spend nearly four years as a battalion and brigade S-3, including two deployments to Iraq. I would have benefited greatly from a publication like this one. Looking back nearly two decades later, I regard that experience as among the most challenging and most rewarding of my career. I hope that you will feel the same after your tour serving as an Iron Major!

A handwritten signature in black ink, appearing to read "Curtis D. Taylor". The signature is fluid and cursive, with the first name "Curtis" and last name "Taylor" clearly distinguishable.

Curtis D. Taylor  
Major General, U.S. Army  
Commanding



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## Introduction

The Center for Army Lessons Learned (CALL) Executive Officer (XO) and Operations Officer (S-3) handbook equips battalion-level officers and their non-commissioned officers (NCOs) with actionable insights and best practices to excel in these critical roles. This handbook tackles common challenges and offers practical solutions to help new XO/S-3s achieve better outcomes and drive unit success.

Each chapter provides additional resources for in-depth exploration of key topics. For example, this handbook describes the XO/S-3's roles in the military decision-making process (MDMP) but recognizes that MDMP is a complex topic that warrants more detailed discussion. We provide references for further reading on topics such as MDMP, rehearsals, and wargaming to other CALL handbooks which discuss lessons learned and best practices for a variety of topics that impact all staff members.

Effective XO/S-3s possess several key attributes that enable them to excel in their roles. These attributes include:

- Mastering staff processes to organize and direct staff activities efficiently
- Focusing leadership and supervision on the commander's top priorities to drive mission accomplishment
- Building high-performing teams that foster a culture of learning, shared understanding, and autonomy, allowing staff members to adapt and thrive in uncertain environments
- Developing systems that empower both the staff and subordinate units to anticipate challenges, identify solutions, and take ownership of problems
- Optimizing time and resources to balance tasks, ensuring seamless execution and maximum productivity

Effective XOs and S-3s must lead by enabling others, rather than trying to do all the work themselves. They achieve this by designing and administering systems that empower their teams to complete tasks in line with the commander's vision.

This handbook provides examples that illustrate this approach, highlighting specific challenges and guiding readers through the thought process and decision-making that leads to the solution. By sharing the "why" behind each solution, readers can gain a deeper understanding of how to apply similar principles in their own contexts.

Observations from combat training centers (CTCs), professional military education instructors, and seasoned Army leaders show that XOs and S-3s often struggle to lead the staff due to gaps in experience, education, and understanding of how to be effective. Chapters 1 and 2 offer a foundational overview of organizational structure and relationships for those who have not considered their impacts. Chapter 3 provides a helpful introduction to leveraging Army training systems for staff development. The remaining chapters focus on practical activities to enhance performance in your key responsibilities.

This handbook provides practical examples and best practices to help XOs and S-3s overcome common challenges. Appendix A on developing a standard operating procedure demonstrates how to integrate products and processes into a comprehensive tool for managing staff activities. Throughout the handbook, you will also find highlighted sections offering valuable insights, including:

Orange boxes provide vignettes, insights, or descriptions of challenging situations.

Green boxes highlight the observed best practices.

Successful field grade officers drive staff output by integrating with adjacent units, supporting their higher headquarters, prioritizing competing demands, and developing systems that enhance team performance. Commanders may evaluate field grades by the unit's output and successes rather than their individual work.

Ultimately, this handbook provides practical guidance on maximizing team potential. This often requires self-management to enable team success, but the core emphasis is on developing and refining the systems that empower the staff to consistently achieve their desired outcomes.

## **Chapter 1**

### **Understand Staff Organization**

The S-3 and executive officer (XO) must understand the capabilities and limitations of staffs and subordinate companies and platoons and how the battalion aligns with higher organization and adjacent battalions. This understanding will allow the S-3 and XO to help the commander understand and visualize mission requirements, make informed decisions, and manage risk. The commander's understanding is informed and refined with the aid of staff running estimates.

As a field grade officer, understanding the roles and the mission of your organization is crucial. To start, familiarize yourself with the unit's role in field and garrison operations as well as the roles of adjacent units. This knowledge will enable you to align your staff, prioritize tasks, and accomplish missions.

Most officers become familiar with the concept of nesting during their respective captain's career courses. Nesting involves considering the missions and capabilities of units you support, those that support you, and adjacent units. This helps to clarify purpose and ensure that your unit's efforts are aligned with the overall goals of the higher command. While it can be challenging for senior raters to assess your individual contributions to a unit's successes, they can easily evaluate how effectively your unit supports the larger organization in achieving its missions and aligning with its vision.

Consider a brigade combat team (BCT) as an example. Within the BCT, maneuver battalions share similar structures and missions, while singular supporting battalions enable maneuver. These supporting battalions bring distinct strengths to the combined team's efforts, often with specialized staff structures and skill sets that are unique to their unit. For instance, certain military occupation specialties (MOSSs) or capabilities may only be found within a single company, making their effective integration crucial to the brigade's mission.

The XO and S-3 must work together to establish, train, supervise, and refine the duties of staff personnel to meet the commander's requirements and those of their higher headquarters (HQs).

### **Brigade Combat Team Organization Design and Missions Impacts**

The BCT remains the Army's primary combined arms maneuver element. While the maneuver BCT historically served as a foundational model for understanding BCT organization, ongoing modernization is rapidly evolving the BCT structure, impacting planning considerations for all staff sections. As of 2025, key changes include the transition of many infantry BCTs to mobile BCT configurations, the elimination of the dedicated reconnaissance squadron, and a reduction in signal and engineer support companies.

This transformation fundamentally alters task organization and responsibilities. The removal of the reconnaissance squadron does not eliminate the requirement for reconnaissance and security tasks; rather, these functions are now distributed across the BCT, often leveraging organic capabilities within maneuver and support battalions. XOs and S-3s must understand these shifted responsibilities to accurately assess unit capabilities during planning and ensure effective task allocation. Failure to account for these changes can lead to gaps in coverage or overburdening of specific units.



- XO/S-3s must review their unit's current table of organization and equipment (TOE) in FMSWeb and the latest Army Structure (ARSTRUC) memorandum focusing on identifying altered responsibilities, updated enabling relationships, and potential impacts on existing standard operating procedures.
- Continuously assess and discuss impacts with subordinates to maintain a shared understanding of the evolving BCT structure and implications for operations.

For an XO/S-3 newly assigned to a brigade, understanding its unique structure is paramount to effectively leading the staff. Each BCT formation (whether Armor, Stryker, Mobile) possesses distinct capabilities and limitations that directly impact planning and execution. These differences manifest in areas like logistical capacity, maintenance priorities, and the emphasis on specific training tasks.

A thorough understanding of the brigade's force structure allows for realistic planning, appropriate resource allocation, and the development of standard operating procedures (SOPs) tailored to capitalize on the unit's specific strengths and weaknesses. Ignorance of organizational differences impact staff estimates, leading to unfeasible or unrealistic staff recommendations.

#### **Best Practices for Understanding Friendly Capabilities**

- Develop staff estimates that provide a clear understanding of the capabilities of adjacent units within your brigade's structure. Update your friendly capabilities estimates when task organization changes occur.
- When changing command relationships, ensure that all staff members understand the capabilities and requirements of the newly attached unit. The gaining unit should brief the commander and staff on their organization's capabilities and requirements.
- Ensure that each warfighting function (such as intelligence, sustainment, and protection) understands the impact of adjacent unit capabilities and limitations on their specific function. This will help them identify potential opportunities and challenges impacting mission execution.
- Determine liaison officer (LNO) requirements to coordinate between units. Ensure LNOs have a deep understanding of unit capability to deliver effects, its requirements for support, and any unique characteristics that impact employment. Good LNOs enable planning for the best use of units.
- Consider how your organization will operate in field environments and how a supporting units' organization impacts coordination. For example, ensure that personnel from the field trains command post (FTCP) understand the limitations and capabilities of enabling units when coordinating sustainment support.

**Note:** The 101st Gold Book <sup>1</sup> is a great example of sharing information on unit capabilities to enable planning and coordination between units.

If you are new to the staff, it is natural to assume that your team members have a certain level of knowledge and experience. However, many of your subordinates may be serving on staff for the first time, think of the new S-4 who was recently a platoon leader. Take the time to ensure the

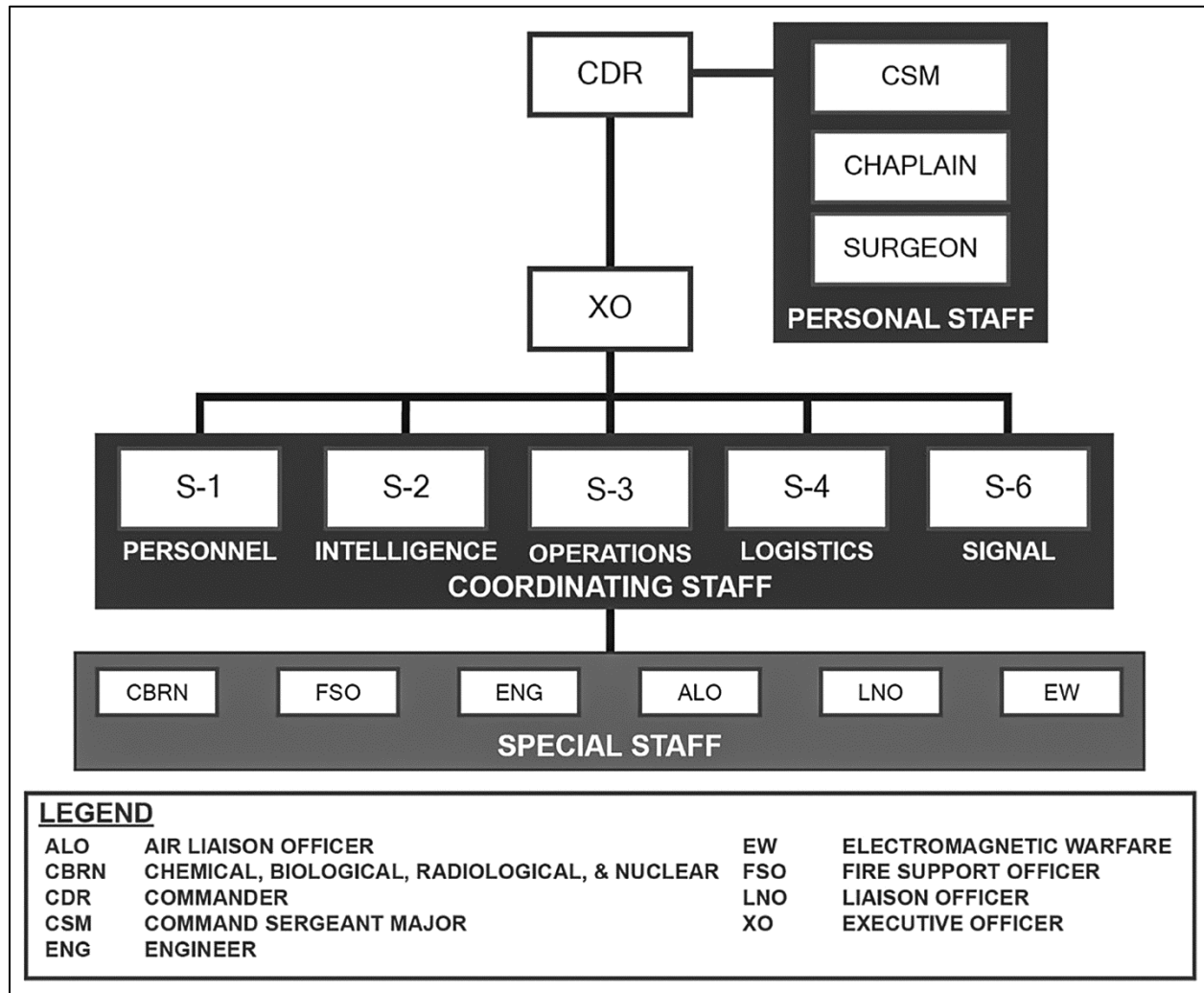
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<sup>1</sup> 101st GOLD (Airborne Division) Book on the doctrine, organization, and capabilities of the division.

staff has a collective understanding of your unit, adjacent units, and higher HQs. Develop continuity tools that capture lessons and expectations so that all staff members can access them.

### Internal Staff Structures

All staff members report to the XO or S-3 unless they are part of the commander's personal staff. Personal or special staff are usually managed and overseen by the XO. They have a direct line to the commander but coordinate with the XO and provide regular updates on actions.



**Figure 1-1. Battalion Staff Organization for a Combined Arms Battalion <sup>2</sup>**

The personal staff supports the commander's decision-making process by providing expert advice and recommendations. These staff members coordinate with either the XO or S-3 when conducting activities like battlefield circulation or when publishing guidance.

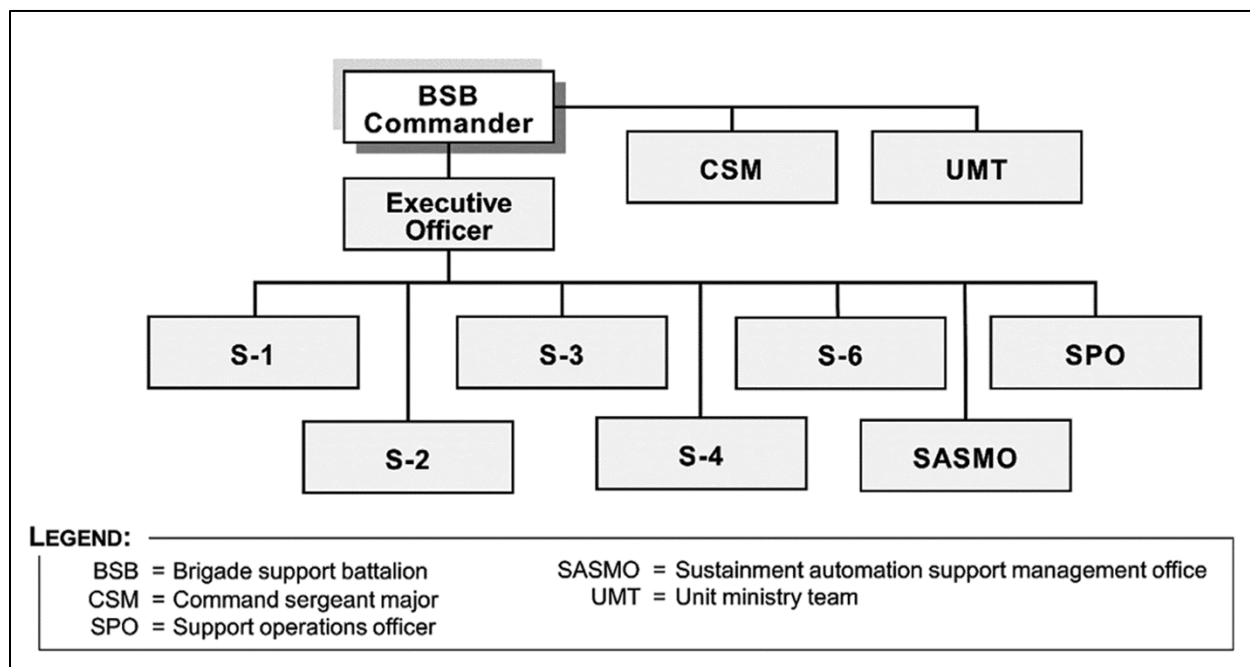
This structure establishes clear lines of communication and authority, with the XO and S-3 serving as primary points of contact for most staff activities. This structure is most effective when all staff members work together in the same location, such as in a garrison environment.

<sup>2</sup> Army Techniques Publication (ATP) 3-90.5, *Combined Arms Battalion*, 15 July 2021, page 1-27.

To ensure effectiveness, unit SOPs should clearly define these relationships and responsibilities based on the mission. The XO/S-3 must revisit and update the SOP when conditions change to maintain clarity and efficiency.

### Other Internal Staff Structures

Unlike maneuver battalions focused on direct combat, support battalions prioritize enabling the maneuver force through logistics, maintenance, and personnel services. Aviation support battalion (ASB), combat service support battalion (CSSB), and brigade support battalion (BSB) staff are uniquely organized to simultaneously synchronize brigade-level sustainment and control the execution of support operations. This requires a staff structure designed with significant differences from maneuver units. Figure 1-2 illustrates a BSB staff's organization.



**Figure 1-2. Brigade Support Battalion Headquarters and Staff <sup>3</sup>**

The BSB's support operations officer (SPO), a field-grade officer, leads the effort to synchronize sustainment. The SPO anticipates and integrates the requirements of the BCT by monitoring on-hand quantities, operational readiness rates, and projected needs, coordinating closely with the brigade S-4. This section actively collects information from supported units to determine sustainment requirements and delivers tailored supply packages. This approach ensures the BCT provides the necessary support to maintain momentum.

Complementing the SPO, the BSB S-3, a company-grade officer, provides command and control (C2) for BSB subordinate companies executing sustainment activities. The S-3 maintains a common operational picture (COP), incorporating threat and environmental factors to inform the commander's sustainment decisions. The S-3 translates the SPO's sustainment concept into orders for BSB elements, ensuring effective execution.

The BSB XO is critical in facilitating this dual focus for a support battalion staff, ensuring both the S-3 and SPO sections have the resources and guidance needed to execute the battalion

<sup>3</sup> ATP 4-90, *Brigade Support Battalion*, 18 June 2020, page1-8.



mission. The XO resolves conflicts between these sections based on the commander's and higher HQ's guidance. The XO ensures the two parts of the staff balance, including:

- Synchronize brigade support activities with supported unit requirements.
- Provide C2 for BSB subordinate companies executing sustainment activities.
- Reduce risk to sustainment forces and nodes.
- Maintain situational awareness of available resources and shortages in anticipation of future operations.

Ultimately, understanding support battalion specialized staff organization is vital for effective coordination for supported units. The ability to anticipate and integrate support requirements contributes to effective sustainment.

### **Organizational Considerations for Units that are Force Providers**

#### **Force Providers Require Different Systems than Units Deploying Together**

As a staff member of a military police (MP) battalion, our subordinate units rarely operated for our battalion when deployed. Our units would attach to maneuver units at the team through company echelon.

These command relationships and missions would last from a few weeks to a year. It was common to have units from our battalion in two to three combatant commands while other units were on "prepare to deploy" orders.

While supporting operational requirements, we maintained our enduring law enforcement and access control mission to the installation. The S-3 section ensured the balance of enduring law enforcement commitments, training readiness, and coordination with maneuver customers.

The staff focused on garrison law enforcement, deployment operations support of subordinate units, and home station training management. Our battalion rarely worked directly at conducting our three mission essential tasks (METs) of coordinating area security, support to mobility, or detainee operations with our subordinates in a training environment.

The nature of how our unit operated differs from the experience of many officers and NCOs who served in BCTs who could focus their training towards perfecting one or more of their METs.

**– Former MP Battalion S-3**

Some battalions will not retain operational control of their subordinate units when they deploy. For instance, engineers, air defense artillery (ADA), and MP units often detach companies, platoons, or teams to provide direct support to deploying brigades. In these situations, the parent unit's staff is responsible for providing home station training, manning, and limited support to units that will ultimately be deployed with other units.

To ensure seamless operations, units that frequently detach subordinates to other HQs must develop processes that account for these circumstances. Key considerations include:

- Clearly defining responsibilities between the originating and gaining HQs
- Establishing systems to identify and resolve personnel and equipment issues
- Defining transition dates and other handover events
- Establishing reporting requirements to maintain situational for all stakeholders

In other circumstances, some battalions will deploy with units they have never worked with before, requiring them to adapt quickly. For example, CSSBs may receive attachments from various units during force generation to accomplish specific activities. These attachments can include units from different compositions, such as National Guard or Reserve units, which can present additional challenges due to differences in procedures, training, or equipment.

To address these challenges, a CSSB staff or similar unit that routinely receives attachments during deployments must develop policies and procedures to accommodate developing relationships and shared understanding. Key considerations include:

- Using approved command support relationships and clearly articulate modifications to roles and responsibilities between HQs
- Refining running estimates to include the capabilities and limitations of the gaining units
- Sharing unit SOPs for conducting operations
- Both units exchanging liaison officers (LNOs) or involve gaining units early in planning to effectively integrate and ensure a smooth transition

Units that routinely provide subordinates to operate with other commands should develop products that describe their capabilities and limitations impacting employments. Figure 1-3 provides an example of a capability brief that provides key information for a commander and staff about a unit commonly tasked to support other battalions.

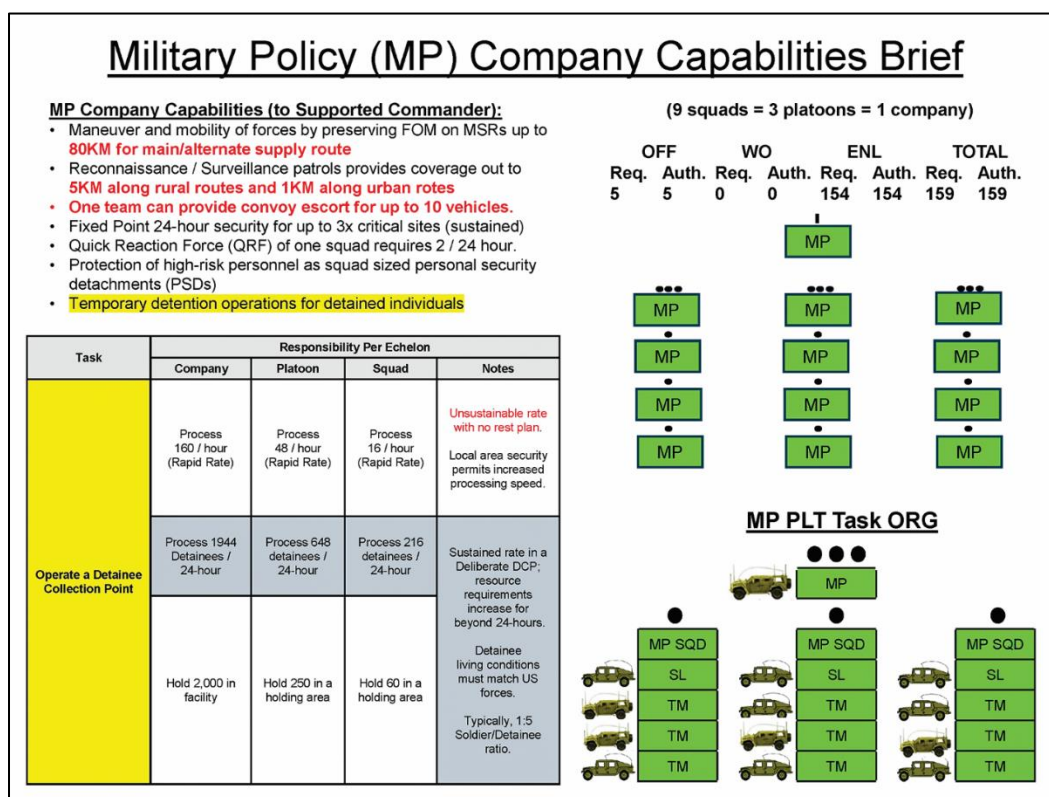


Figure 1-3. Example of a Capabilities Brief<sup>4</sup>

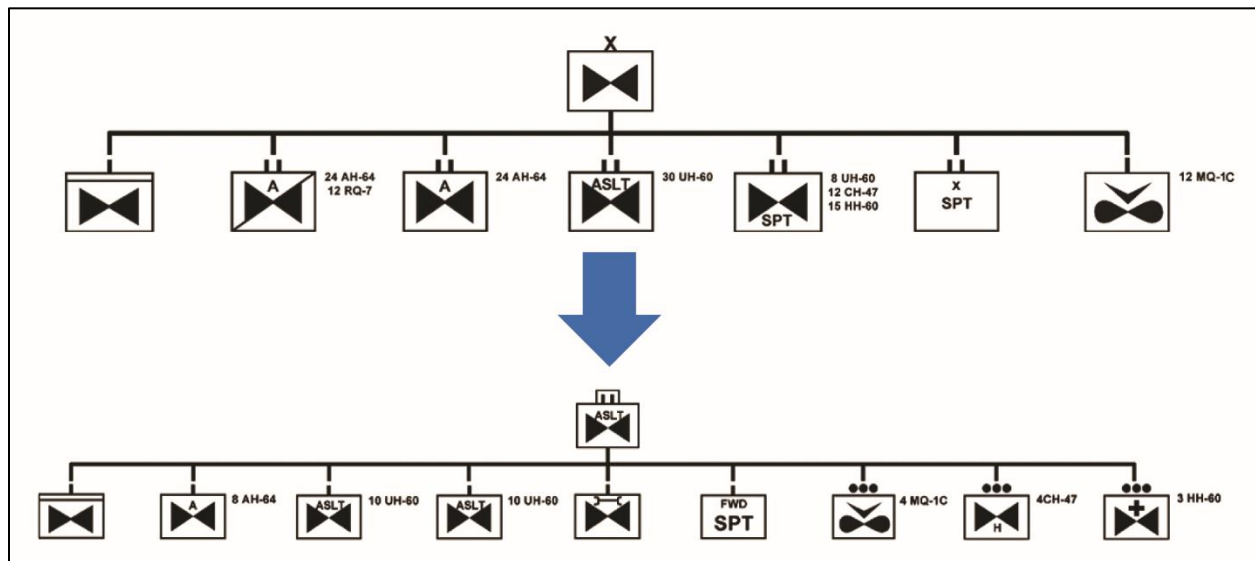
<sup>4</sup> CPT Bower, Jesse. 31 July 2025.

## Forming a Task Force

Forming a task force occurs when you attach through a change in command relationship at least one company to a battalion. The duration of this relationship can be as short as a single phase of an operation (i.e., attachment of engineers during a breaching operation) to lasting for the duration of a deployment.

The formation of a task force, such as an air assault task force (AATF) or a combined arms team organized for breaching obstacles, presents significant challenges to staffs. Impacted by factors such as frequency of building a task force or the complexity of integrating diverse units under pressure. The XO/S-3 should minimize the time and staff activities required to transition from directing formation of a task force organization to mission execution. Direct development of SOPs that support the rapid assimilation of subordinate units into their planning and execution processes.

Combat aviation brigades offer a valuable model for mitigating these challenges. Because of the frequent need to form an aviation task force (AVN TF) from multiple subordinate battalions (Figure 1-5), combat aviation brigades have standardized processes for reporting, naming conventions, risk mitigation, and flight operations. This pre-established framework enables not only rapid formation but maintains continuity for crews despite the frequent and short duration of these command relationships.



**Figure 1-5. Organizing an Aviation Task Force from a Combat Aviation Brigade<sup>5</sup>**

Units frequently forming AATFs, have adopted and refined the military decision-making process (MDMP) to specifically address the synchronization challenges inherent in planning. This includes dedicated rehearsals within the AVN TF and culminating in a combined arms rehearsal (CAR) with the ground forces. This is to ensure all commanders and flight leads share a common understanding of the operation.

The XO and S-3 must address the inherent risks associated with task force formation, particularly when occurring immediately prior to mission execution. Developing robust unit SOPs that anticipate common pitfalls is critical to ensuring successful planning for anticipated

<sup>5</sup> Field Manual (FM) 3-04, *Army Aviation*, 6 April 2020, pages 2-2 and 2-14.



operations. A unit that routinely receives attachments to execute offensive or defensive operations should anticipate and describe how to effectively integrate those units in time-constrained environments to ensure mission success.

**Best Practices when forming a Task Force**

- Codify a process (checklist) for integrating new units (LNO exchange, sharing SOP, adjustments to planning processes, etc.).
- Standardize planning guidance for all potential subordinates to ensure information sharing on capabilities and limitations of new units.
- Allocate increased planning and rehearsal time for subordinates, recognizing the complexity of integration.
- Conduct additional rehearsals with subordinates to identify and address unforeseen gaps.

The example of the AVN TF highlights the importance of standardized procedures, clear communication, and comprehensive rehearsals when incorporating attachments or forming task forces. The XO and S-3 must develop systems and train on processes that maintain awareness of all the tools available to the commander to accomplish missions. One should examine all impacts when task organization changes occur.

## Chapter 2 Relationships

Beyond organizational design and mission, a unit's operational effectiveness is impacted by relationships within the staff and with external units. Without building and leveraging personal connections, even the most well-planned tasks can stall due to friction, miscommunication, or competing demands. This chapter outlines how to develop a staff culture that prioritizes relationship building as a core component of operational effectiveness.

Prioritizing relationships within the command team and staff sections is paramount. A shared understanding of the commander's intent, powered by open communication and mutual respect, creates a cohesive team capable of tackling complex challenges. Executive officers (XOs) and S-3s can actively nurture these internal relationships by soliciting regular feedback, mediating conflicts, and publicly recognizing individual and team contributions. This creates a cohesive staff prepared to execute the commander's vision.

Building those strong relationships, both within the battalion and beyond, requires a conscious and consistent effort including:

- Recognizing that trust and open communication are essential.
- Engaging with adjacent units, higher staff, and one's own team regularly.
- Understanding the perspectives, needs, and challenges of others.
- Maintaining clear and consistent communication channels.

XOs and S-3s build mutually beneficial relationships by understanding the priorities and challenges of outside units. By cultivating relationships, you enhance the unit's ability to achieve its goals and overcome obstacles.

Finally, cultivating a culture of mentorship within the unit where leaders leverage and develop subordinates is a vital component. By weaving these relationship-focused best practices, staff leadership can improve processes, maximize individual potential, and achieve mission success.

### The Big 5

At the battalion level, the "Big 5" (including the commander, XO, S-3, command sergeant major [CSM], and operations sergeant major [OPS SGM]) play a pivotal role in shaping the unit's effectiveness and command climate. In essence, the other members of that team are there to make the commander's vision come to life. Successful units define the roles and responsibilities of each Big 5 member by leveraging their individual experiences, strengths, and weakness to maximize the team's overall performance. By doing so, commanders tailor their responsibilities to the operational environment and their own leadership style, ensuring that each member of the "Big 5" can make their greatest contribution to the team.

### **Best Practice Fostering Effective Big 5 Relations**

#### **Communication and Understanding**

- Define roles and expectations: Help the commander clearly articulate roles, responsibilities, and expectations for each member of the Big 5 (commander, XO, S-3, CSM, OPS SGM) and provide focus areas. Solicit the commander's expectations when you are not clear.
- Adapt to commander's style: Determine the commander's preferred method of receiving information (verbal, visual, detailed, conceptual). Share this information with the staff and tailor products accordingly. Regularly observe to confirm alignment with the Commander's needs.

#### **Synchronization and Coordination**

- Conduct regular Big 5 huddles: Meet to synchronize actions, share priorities, and address challenges.
- The XO must understand the impact of guidance on all staff sections and provide clarification of priorities. The S-3 must consider impacts to subordinate training plans that are locked in.
- The XO/S-3 establishes clear guidance for all staff members regarding communications with external organizations and subordinate units. Also, share your commander's intent with other organizations.
- Utilize the OPS SGM as a key liaison to articulate concerns from subordinates, clarify expectations, and enhance synchronization across the battalion.

#### **Team Development**

- Organize events that allow the Big 5 to understand individual strengths and experiences. Consider exercises like mind-mapping, red-teaming, or design sessions to explore philosophies and problem solving (see subsequent chapters for detailed examples).
- Regular physical training (PT) with the Big 5 and/or staff sections can build camaraderie and break down communication barriers. Follow up PT with a team breakfast to discuss topics of interest and build comradery.

When members of the Big 5 have concerns or differing opinions, they must engage in open and respectful dialogue, addressing their concerns in a constructive and private manner with the commander. Similarly, senior staff members must maintain confidentiality, recognizing that breaches of trust can have lasting and damaging consequences.

### **Dysfunction in the Big 5**

After graduating the Sergeants Major Course at Fort Bliss, I assumed duties as the OPS SGM of an infantry battalion in Germany. The battalion had recently redeployed from Kosovo, had a new battalion commander, and had received orders to deploy in support of Operation Iraqi Freedom.

Shortly after receiving orders, the CSM retired. With no replacement inbound, I assumed duties as the CSM. I served in this role for eight months through the gunneries, Joint Multinational Readiness Center (JMRC) rotations, and home-station training prior to the battalion's deployment.

During our train-up, the "Big 5" (now Big 4) became a close-knit team. We shared thoughts and opinions on everything. This included discussing our personal strengths and weaknesses, as well as how to best support the battalion commander's requirements. The bottom line is we operated in lockstep and communicated his intent throughout the formation.

I felt thankful when the new CSM reported two weeks before Thanksgiving. He set the tone early on how he would fit with the team, but not in a good way. Longstanding tradition holds that unit leadership serve the Thanksgiving meals in their dress uniforms to Soldiers and their families. The new CSM did not participate because he "didn't know these guys." As expected, the Soldiers and leaders of the battalion noticed his absence. His lack of participation in common leadership practices was the first of many actions that undermined his reputation and created discontent amongst the team.

During the first three months of our deployment to Iraq, I went on patrols with the companies at least 10 times. My actions contrasted with the CSM who did not go on patrols with subordinate units.

I had conversations with the CSM about the erosion of a positive command climate that ended in frustration. He even attempted to curtail my leaving the forward operating base (FOB) accusing me of trying to make him look bad. As issues began to build, the battalion commander considered whether he should relieve the CSM but chose not to act. In the end, the battalion commander, CSM, and S-3 were all relieved of their duties by the division commander.

The Big 5 relationships matter not only on an interpersonal level but impact your performance and how your team accomplishes missions.

- Observations from former CSM

### **Big 5: XO/S-3 Shared Relations**

Clear delineation of roles between XO and S-3 is essential for efficient staff operations. Where the XO oversees staff coordination and ensures consistent communication across the battalion, the S-3 focuses on planning and execution, integrating staff efforts to achieve the commander's intent. Consistent dialogue between the XO, S-3, and commander clarifies responsibilities and resolves potential conflicts before they occur, ultimately enhancing the battalion's overall effectiveness.

As a company grade officer, I did not realize that the roles of the XO and S-3 were flexible. Over time, I realized that responsibilities and relationships changed based on factors such as personality or the operating environment.

Deploying dramatically shifted my role as S-2 and the dynamics within the staff. In garrison, my duties primarily involved reporting to the XO. I had limited interaction with the commander outside of command and staff or other all-staff events. My contact with the S-3 focused on coordinating taskings like physical security inspections.

During my deployment, the S-2 section embedded within the S-3's current operations cell. I found myself briefing the commander directly on the enemy situation multiple times daily, collaborating extensively with the S-3 developing plans and orders, as well as accompanying the commander on battlefield circulation. Conversely, my interactions with the XO became limited to administrative tasks.

- Comments from Former Battalion S-2

Beyond managing relationships with external agencies and units, the XO/S-3 must provide clear guidance to the entire staff members on communications with outside organizations and subordinates.

The XO and S-3 are critical enablers, ensuring the commander's guidance is clear and translates into actionable tasks for the staff. They facilitate this process by clarifying requirements and confirming a common understanding of the commander's desired end state and acceptable risk.

Combat training center (CTC) observations consistently reveal that staffs struggle in transitioning from conceptual planning to detailed execution. This disconnect frequently stems from a lack of clear understanding of the commander's intent. Observer, coach/trainers (OC/Ts) observe staffs spending significant effort interpreting ambiguous guidance, resulting in delays during the planning process.

The XO and S-3 assist the commander in disseminating clear guidance and at times assist in formulating that guidance. Establishing a common understanding of intent maximizes efficiency and improves the quality of all planning efforts. To achieve this, the XO and S-3 must actively solicit clarification, ask probing questions, and confirm understanding of the commander's vision. They then translate that vision into specific actions for the staff and determine prioritization accordingly.

This interdependent relationship between the commander and staff is visually represented in Table 2-1. The table demonstrates the necessity of constant, two-way communication to clarify expectations and adjust responsibilities. This iterative process ensures the staff remains aligned with the commander's intent throughout planning and execution. The XO holds primary responsibility for fostering these interactions.



**Table 2.1. Common Duties and Responsibilities<sup>6</sup>**

Commander Responsibilities	Common Staff Duties and Responsibilities
<ul style="list-style-type: none"> <li>• Train the staff on combining the "art" of command with the "science" of control.</li> <li>• Set the standards for training the staff.</li> <li>• Drive the operations process.</li> <li>• Determine if there is a need for design prior to conducting the military decision-making process.</li> <li>• Provide guidance for each step of the military decision-making process.</li> </ul>	<ul style="list-style-type: none"> <li>• Advise and inform the commander.</li> <li>• Build and maintain running estimates.</li> <li>• Prepare plans, orders, and other staff writing.</li> <li>• Assess operations and providing recommendations.</li> <li>• Exercise staff supervision and managing information within their area of expertise.</li> <li>• Identify and analyze problems.</li> <li>• Perform risk management.</li> <li>• Perform intelligence preparation of the battlefield [operating environment].</li> <li>• Conduct staff inspections.</li> <li>• Conduct staff research.</li> <li>• Perform staff administrative procedures.</li> </ul>

**Big 5: XO/S-3 Relationship with the CSM**

To achieve success, the XO and S-3 must leverage their relationship with the CSM by tapping into thier expertise and influence. As the senior enlisted noncommissioned officer (NCO), the CSM brings a unique perspective and wealth of experience to the table, having advised commanders and staff on key events like military decision-making process (MDMP), battle rhythm, personnel decisions, and unit policies.

The S-3/XO should seek the CSM's guidance on training strategies. CSMs provide invaluable experience in techniques to effectively employ companies and platoons to accomplish mission tasks and build unit standard operating procedures. Their counsel serves as a critical sounding board for the commander, XO, and S-3 during planning and decision-making.

The S-3 can benefit from the CSM's operational expertise, particularly in areas such as battle rhythm, MDMP, and coaching the OPS SGM. By collaborating with the CSM, the S-3 can gain a

<sup>6</sup> Army Techniques Publication (ATP) 5-0.2-1, *Staff Reference Guide Volume I Unclassified Resources*, December 2020, pages349-250.

deeper understanding of the unit's operational needs and develop plans that are tailored to those needs.

As a trusted set of eyes and ears, the CSM provides invaluable insights during battlefield circulation, enriching the commander's situational awareness. CSM feedback helps the XO assess the effectiveness of staff communications and products while informing staff running estimates on Soldier welfare and sustainment activities. Additionally, the CSM's insights into staff personnel matters and junior leader development help identify and address issues before they become major problems.

### **Big 5: Operations Sergeant Major**

The OPS SGM is a seasoned leader within the S-3 cell and can provide invaluable experience and expertise to the battalion's command post and operations. In field environments, OPS SGMs spend more time working with the XO directing the staff at the main command post. In units without a dedicated OPS SGM, a senior NCO assumes the responsibility of integrating enlisted personnel into staff functions.

While the CSM upholds standards across the entire formation, the OPS SGM focuses on the staff ensuring effective communication with companies with meticulous battle tracking and effective support to planning. The OPS SGM mentors staff members from all sections to deliver impactful briefings and assessments of the operational environment.

During planning, the OPS SGM scrutinizes orders, establishes conditions for smooth MDMP execution, and prepares for rehearsals. A good OPS SGM will meticulously track tasks through completion. They are the linchpin for maintaining a common operational picture (COP) within the staff and across different headquarters.

As a guardian of standards, OPS SGM's influence extends beyond the staff to the entire unit. These personnel provide leadership in the CSM's absence, often overseeing promotion boards, inspections, and unit training. Their input is crucial in selecting enlisted personnel for the S-3 section. Like the S-3 and XO, the OPS SGM cultivates strong relationships with company leadership, acting as a conduit for amplifying and clarifying command guidance. OPS SGMs' insights are invaluable in identifying potential issues with orders, rehearsals, or SOPs to ensure seamless execution of the commander's intent.

### **Beyond the Big 5: Building Junior Staff Members**

Battalion XOs and S-3s must excel at empowering their subordinates. With potentially over 30 personnel in a typical S-3 section and more than double those numbers across multiple staff sections under the XO's purview, effective delegation is paramount. All staff leaders must cultivate systems that enable their teams to thrive by utilizing junior officers, NCOs, and Soldiers to execute processes.

The best field grade officers understand they cannot out work the job alone. Even at the lowest level, there is a cost if you are unable to develop systems and people that operate without constant input and supervision. That cost presents itself in staff burnout, broken relationships, or failure to develop subordinates. If you make yourself a single point of failure as a field grade officer, then your organization is neither resilient nor have you developed future leaders.

- Comments from a Former Observer, Coach/Trainer

Building confidence in all personnel, particularly junior officers and NCOs, is crucial for fostering this widespread participation. Routinely entrusting junior leaders with briefing opportunities during staff meetings directly contributes to this goal.

This practice yields significant benefits in both garrison and field environments. Developing leaders can gain experience articulating complex information, building the confidence to brief the staff and commander during routine interactions. Every staff member should be able to confidently brief the activities of their functional area, whether responding to the commander's inquiries or fielding questions from higher headquarters.

#### **Best Practices for Developing Junior Staff**

- **Immerse staff in the planning process:** Don't relegate junior staff to just administrative tasks. Actively involve them in MDMP, assigning them ownership of specific steps or annexes. Encourage their participation in war-gaming and brainstorming sessions, valuing their perspectives and insights.
- **Cultivate briefing and assessment skills:** Regularly have junior staff brief their section's running estimates, providing constructive feedback on both content and delivery. This builds their confidence and fosters a shared understanding of the operational picture.
- **Challenge staff to think critically:** Avoid questions with simple factual answers. Push junior staff to analyze information, identify implications ("So what does that mean?"), and propose solutions. This develops their critical thinking skills and empowers them to contribute meaningfully.
- **Embrace risk to allow development:** Create a learning environment where junior staff feel safe to make mistakes. Underwrite reasonable risks, providing guidance and support to help them learn from any missteps. This fosters initiative and builds a more resilient and adaptable team.
- **Provide regular feedback and mentoring:** Don't wait for formal counseling sessions. Offer frequent, specific feedback on their performance, highlighting both strengths and areas for improvement. Cultivate a mentoring relationship to guide their professional development.

#### **Relations with Subordinate Commands**

Building strong relationships with subordinates demands a proactive and empathetic approach. Begin with cultivating a culture of open and honest communication. Go beyond simply having an open-door policy. Actively seek input from subordinate leaders through regular forums for dialogue, such as monthly roundtables or informal gatherings.

### Vignette

#### Fostering Effective Communication

During my time as company commander, I found there were times when the XO or S-3 disrupted my company's priorities of work. Our squadron commanding officer provided clear guidance to the company commanders, and we provided daily focus areas for our platoon leadership.

Looking back, I understand that XO and S-3 both meant well. However, when they spoke directly to platoon leadership the results were confused priorities, missed training, and ineffective use of time. In one instance, the troop was training on gunnery skills tasks in the motor pool when the squadron XO directed the platoon leader to get his vehicle heat grates rewelded.

Eventually the company commanders talked with the field grades to ensure guidance was issued through the commanders. This improved the company commander's perceptions of the staff and created clear lines of communication.

- Comments from Former Troop Commander

When assigning complex tasks, embrace collaboration by actively involving company commanders and their first sergeants in the problem-solving process, valuing their perspectives and experience. It's crucial to remember that company-level perspectives and challenges often differ significantly from those at the battalion level. Staff officers should remember their own time in company-level positions and strive to provide the support they wished they had received, ensuring that orders and communication are clear, predictable, and actionable.

Additionally, some subordinate units manage several relationships to accomplish their mission. The forward support company manages a relationship with the staff (XO and S-4 primarily), the other companies in the battalion, as well as leadership from the brigade support battalion.

Invest in educating junior officers and company leaders, who may lack extensive staff experience, understand battalion staff processes and expectations. Ultimately, fostering a unit climate characterized by engagement, clear communication, and mutual respect will forge strong bonds between the staff and subordinate units.

#### Best Practices in Collaborating with Subordinate Commands

- Whenever possible, engage with subordinate units to review taskings and plans before issuing formal orders. Working collaboratively provides a valuable opportunity to identify and address potential roadblocks early and reduce frustration.
- Regular or informal meetings between the OPS SGM and ISGs, the S-3 and company commanders, or the battalion and company XOs can facilitate collaboration.

While you fulfill the role of XO or S-3, it's crucial to remember that you, along with your staff, still fall under the purview of the headquarters and headquarters company (HHC) commander. Your NCOs and officers share more than a symbiotic relationship with the HHC.

Reinforce the expectation that your Soldiers, both NCOs and officers, must adhere to HHC guidance regarding physical fitness standards, property accountability, counseling, record maintenance, and individual/collective training requirements. Your active participation in HHC activities demonstrates visible support and emphasizes the shared responsibility in developing Soldiers and leaders.

Furthermore, prioritize routine communication and coordination between the HHC commander, 1SG, XO with the battalion XO, S-3, and S-3 noncommissioned officer in charge (NCOIC). This approach fosters a cohesive environment, minimizes potential friction, and ensures the seamless execution of HHC tasks while simultaneously accomplishing the demands of staff functions.

#### Best practices for Integrating Specialty Platoons and Enablers

- **Integrate into MDMP:** When possible, incorporate specialty platoon, HHC, and forward support company (FSC) leadership into MDMP training exercises. This fosters a shared understanding of planning procedures and facilitates staff and order development collaboration.
- **Provide a platform:** Offer specialty platoons opportunities to brief during training meetings. This allows them to showcase their capabilities, share insights, and actively engage with the battalion staff.
- **Promote cross-training:** Integrate specialty platoons into company-level training based on their roles in various operating environments. For example, incorporate sections from battalion scouts, mortars, and medics to directly support platoon and company live-fire events. This fosters interoperability and enhances overall unit cohesion.

### Higher and Adjacent Unit Relations

#### Vignette Being a Good Teammate

My S-3 briefed the brigade commander on our quarterly training plan, identifying several potential challenges related to logistical support and alignment to brigade priorities. Two days later, our sister battalion briefed a plan that mirrored ours without addressing the issues we had exposed. The brigade commander became apoplectic expressing significant disappointment in our unit. He stated that the lack of inter-battalion coordination demonstrated a failure to prioritize brigade combat team's (BCT's) collective success.

While the Brigade commander did not expressly disseminate direct insights across the BCT, afterwards he questioned our battalion's commitment to teamwork. Within a BCT, failing to share information isn't simply an oversight, it is a demonstrable lapse in professional responsibility that can erode a unit's reputation.

Have you heard the question, "Are you a team player? Do you make the organization better?" New battalion XOs and S-3s often assess their success in this area by how well they collaborate within the battalion. However, they may not realize until later that their senior raters view team players from a brigade or regimental perspective.

One has a limited number of times to use "no" with higher headquarters, choose these times judiciously or risk becoming ineffective.

Your peers in other battalions and brigade staff members form opinions about your teamwork. How leadership outside your organization perceives your performance at being a team player can be even more influential on perceptions of you than your subordinates' views.

This perception impacts more than just your senior rater's assessment. It affects how the higher staff interacts with your entire organization. Human nature dictates that people avoid negativity



or people they view as self-serving. If your interactions are consistently negative or you're always trying to bypass established channels, your unit will miss opportunities.

### **Best Practice for Sharing with Adjacent Units**

After every direct interaction with the brigade staff (or higher), take the initiative to share a concise summary with adjacent units and higher staff. This fosters transparency and collaboration across the board. Here's what to include in your summary:

- **Feedback report:** Briefly outline the key feedback received during the interaction.
- **Friction points and lessons learned:** Highlight any challenges encountered and recommend adjustments other units should consider.
- **Best practice spotlight:** Share any noteworthy practices observed that could benefit other units.
- **Resource revelation:** Did you utilize any new or unique systems or resources? Briefly describe their benefits.

Remember, your relationship with higher headquarters is a two-way street. While you need to fulfill their information requirements, the brigade staff are also there to help you solve problems. Leverage their expertise to overcome challenges and develop better plans that support your commander's guidance and intent. While you may not always be the top priority, good relationships ensure the staff is available to assist you.

### **Examples of Higher Headquarters Staff supporting Battalion S-3/XOs**

#### **Brigade Staff Judge Advocate (SJA):**

#### **Proactive Legal Reviews**

- **Policy compliance check:** Before implementing any battalion or company-level policies, submit them to the SJA for review. They will ensure alignment with the Uniform Code of Military Justice (UCMJ) and applicable regulations, minimizing legal risks.

#### **Operational Law Expertise**

- **Training and education:** Request SJA-led training on crucial topics like the Law of Armed Conflict, Rules of Engagement, and relevant treaties/agreements. This equips your team to navigate complex operational environment responsibilities.
- **Operational law support:** Integrate the SJA into your planning process. They provide legal reviews of plans, orders, and operational concepts, ensuring your operations are legally compliant and strategically sound.

## Chapter 3

### Developing Subordinates

#### Your Role in Staff Development

Executive officers (XOs) and operations officers (S-3s) play a crucial role in shaping the growth and development of their staff officers. By investing time and effort in their development, you will not only enhance their performance but also contribute to the overall success of your organization. Effective staff officer development is essential, as it enables your team to support the commander, drive decision-making, and achieve the unit's objectives.

As a direct supervisor, you are responsible for assessing performance, providing constructive feedback, and guiding your staff in executing their duties. While you may not be a subject matter expert in every area, you must ensure your staff can provide well-informed recommendations to the commander. Your oversight is critical. You will typically conduct the final review of products before the staff member presents them to the commander or external organizations.

Staff development requires leveraging expertise across the brigade. XOs and S-3s should seek opportunities to develop staff officers in branches outside their own. Specifically, consider routinely utilizing the brigade S-2 (intelligence), S-4 (logistics), S-6 (Signal), and medical officer (MEDO) to provide branch/military occupational specialty (MOS)-specific development and training to their counterparts on your staff. These subject matter experts can deliver targeted instruction beyond the scope of general staff training the XO could provide.

#### Aligning Development with the Commander's Priorities

When developing your staff officers, it is essential to align your approach with the commander's priorities and vision. This guidance can come from various sources, including personal counseling sessions, published vision statements, written directives, and regular engagements with the commander. Some commanders may provide detailed lists of duties, responsibilities, and expectations, while others may offer more flexibility, adjusting as needed.

The Army promotes development and performance through three specific methods:<sup>7</sup>

- Counseling
- Coaching
- Mentoring

The following sections will discuss common opportunities and best practices for conducting these activities.

#### Counseling the Staff

Defining roles and responsibilities for staff personnel is crucial for establishing clear objectives. Relationships, personalities, and mission requirements can all influence staff expectations between your team and outside organizations. Your unit's standard operating procedure (SOP) should clearly articulate these expectations for each position, ideally encompassing both garrison and field environments. Further define your expectations regarding critical aspects of their performance to include what they need to know, be familiar with, and maintain expertise about.

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<sup>7</sup> Army Techniques Publication (ATP) 6-22, *Providing Feedback: Counseling–Coaching–Mentoring*, February 2024, page 2.

Understanding your role, the unit's mission, the commander's objectives, and the staff organization is crucial before conducting individual counseling sessions with subordinate staff members. Consider not only who each field-grade officer will counsel but also who will oversee individuals with specialized roles reporting directly to the commander (e.g., chaplain and command family readiness representative). These individuals often require a balance of accountability and recognition of their unique reporting relationships.

Prioritize providing written counseling for those you will rate, particularly staff non-commissioned officers in charge (NCOICs). Often, section NCOICs must assume the duties of their supervisors. Therefore, their counseling should align with many of the performance standards expected of those in the next higher grade. As their senior rater, your counseling should provide clear goals and expectations for NCOs, both individually and for their sections.

When counseling staff members, brief standards for Soldiers to be prepared to assume the duties of personnel two levels senior to their current position. Facilitate this by creating continuity files or books that outline responsibilities, training subordinates on leader tasks, and providing consistent feedback. Seek opportunities to train both subordinates and primary staff members on all critical tasks.

#### **Best practices for Providing Feedback**

- **Seize the moment:** Treat every meeting or event as an opportunity for coaching and guiding staff actions.
- **Clarify expectations:** Do not assume shared understanding. Clearly articulate expectations for new tasks, considering the diverse experiences of your staff members. Paint a clear picture of what success looks like.
- **Pre-task huddles:** Before launching major tasks, hold huddles with key individuals to outline objectives, expectations, and timelines.
- **Stay connected:** Regularly circulate through staff areas, inquiring about current activities, roadblocks, and priorities. This approach allows course corrections and ensures progress toward the desired end state.
- **After-action reviews (AARs):** Conduct thorough after-action reviews for larger activities. Consolidate lessons learned, document sustains and improvements and incorporate them into future iterations. Share them with your peers.
- **Formalize in writing:** Provide written counseling that highlights positive actions, identifies areas for improvement, and offers a clear assessment of overall performance. This documented feedback loop fosters growth and sets the stage for formal evaluations.

Utilize formal and informal methods to provide counseling, encompassing evaluations of individual and staff section performance. Structure routine counseling sessions as open discussions with rated and senior-rated personnel with a goal of improving performance and building knowledge. Provide clear expectations. Beyond identifying shortcomings, spend time determining a root cause. Reinforce positive behaviors and address sub-optimal performance before they escalate into significant issues.

**Benefits of Counseling<sup>8</sup>**

- Promotes growth and development for improved performance
- Supports a learning environment through shared understanding and shared mental models
- Supports adaptive and critical thinking
- Develops and reinforces desired behaviors
- Addresses undesirable behaviors
- Prompts change
- Creates awareness
- Shifts perceptions
- Boosts confidence
- Enables a strong relationship between giver and receiver

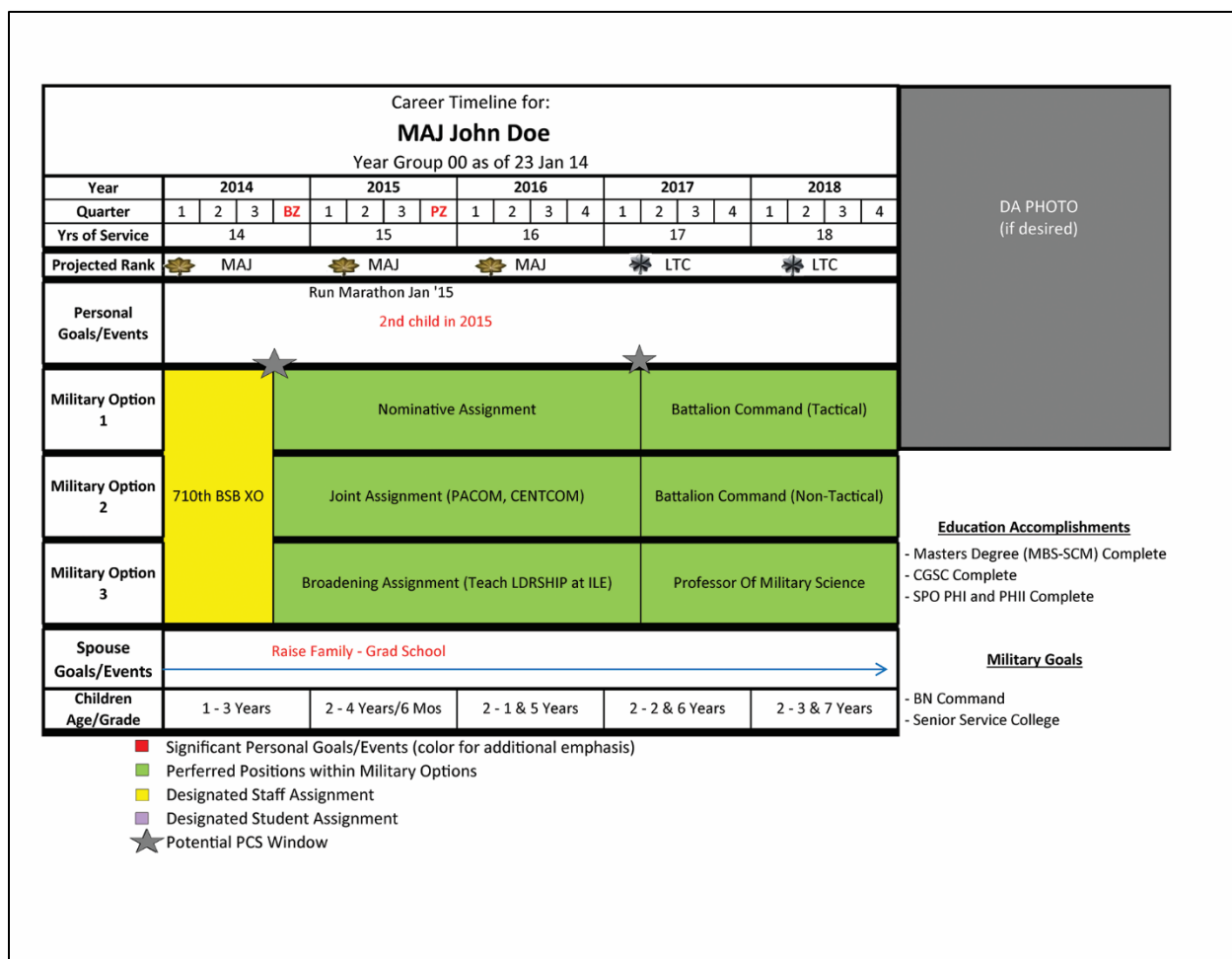
A practical approach to guiding professional development is utilizing a 5-year plan, like the model in Figure 3-1. This tool, adapted from various career timeline models, encourages a whole Soldier approach, prompting a more in-depth discussion that extends beyond mere assignments. It empowers both the rater and the rated individual to analyze the potential impacts of career choices, weighing opportunities against risks to personal and professional goals.

Encourage the rated individual to prepare a draft outlining their aspirations, juxtaposed against the typical career progression for their branch.

This provides a framework for you, as the officer's rater to offer tailored recommendations and developmental plans supporting their goals. By reviewing both short- and long-term goals, you ensure a balanced approach to career planning, empowering individuals to make informed decisions that align with their aspirations.

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<sup>8</sup> Ibid.



**Figure 3-1. Example of a 5-year Plan <sup>9</sup>**

Like the 5-year plan for officers, you can guide your rated and senior-rated NCOs in developing a comparable career roadmap. Empower them to take ownership of this process by having them construct the initial draft. A valuable resource is the U.S. Army Career Tracker website with career maps, providing recommended advancement guidelines for every career management field.<sup>10</sup> While you cannot predict future assignments, you can leverage this information to collaboratively identify relevant training opportunities within the next two years. This ensures their professional development aligns with both the Army's expectations and their long-term personal goals.

## Coaching

As a new battalion XO or S-3, you will significantly influence subordinate performance through coaching, even without direct supervisory authority over company leaders. Effective coaching builds competence. It reinforces the commander's intent and ensures consistent execution of battalion priorities. This is particularly crucial when guiding company commanders and platoon leaders through complex operations and training events.

<sup>9</sup> [https://www.army.mil/article/240876/asm\\_5\\_year\\_timelines](https://www.army.mil/article/240876/asm_5_year_timelines).

<sup>10</sup> <https://actnow.army.mil/>



Your coaching role centers on providing targeted feedback and guidance to improve understanding and performance, not simply correcting mistakes. Cultivate a collaborative approach by actively seeking opportunities to engage with company leadership. This includes offering insights based on your experience and helping them anticipate challenges in their duties before they arise.

Specifically, leverage routine interactions to coach subordinates. Ask clarifying questions about understanding of commander's intent, key tasks, or risk assessments and mitigation plans. When synchronizing efforts with company XOs, focus on identifying potential conflicts and developing solutions that ensure mission success.

Your coaching extends to specialty platoons and enablers, who often operate directly for the battalion, while maintaining support relationships with their parent companies. Ensure you understand their unique capabilities and dependencies to integrate these assets effectively into battalion plans. Remember, each interaction is an opportunity to develop your team's capacity to see problems and shape their efforts to support the commander's priorities.

## **Mentoring**

Mentoring is a long-term relationship focused on the subordinate's overall professional development. It's about sharing experience, providing guidance, and helping the subordinate achieve their full potential. It's less structured than counseling but may have more profound or lasting impacts on a Soldier's career.

Often the mentoring relationship will last long after any supervisory role ends. In this relationship, you use experiences (good, bad, experienced, or observed) to help navigate career options, complex problems, and ethical dilemmas. Less about immediate problems, it deals with long term development of the professional Soldier.

In most cases, there is not a formal process to establish a mentoring relationship, but it can be formalized if desired. Built on trust and rapport, mentoring can have rewards for both participants and can continue even when one of the members leaves the service.

## **Support Developmental Programs**

While the commander sets the overall direction, XOs and S-3s play a vital supporting role in implementing the leader professional development (LPD) program. This encompasses tracking topics, aligning resources, conducting quality checks, and even maintaining records and instructor certification.

Unit LPDs can serve as integral components of a commander's leader certification for training events. When preparing for a training cycle involving new or complex scenarios LPDs can be a part of leader certification. LPD provides a platform for swiftly addressing areas of concern. Some common examples of how to use LPD to shape training include the following:

- Prior platoon-level training, the commander might leverage an LPD to review SOPs, safety standards, and doctrine on applicable battle drills, ensuring consistent standards across formations.
- Review professional publications (handbooks on combat training center [CTC] Trends, military decision-making process [MDMP], or wargaming) and discuss the commander's visualization for executing complex tasks.
- A unit facing challenges with safety or maintenance procedures, can use LPDs to implement immediate corrective actions and reinforce best practices.

Similarly, the XO and S-3 often provide support to the Non-commissioned Officer Professional Development (NCOPD) program, typically led by the command sergeant major (CSM). The XO and S-3 synchronize NCOPDs with other unit activities, ensuring dedicated time on the training calendar, coordinating suitable locations, and procuring necessary materials.

Beyond LPDs, they facilitate CSM execution of boards, managing promotion events, and facilitating NCO and unit induction ceremonies. These are crucial elements in fostering a professional and cohesive organizational culture.

### Conclusions and Additional Resources for Developing Subordinates

Numerous Army organizations offer valuable resources to aid in developing your subordinates. Table 3-1 provides a starting point for your research. The benefits of investing in your team's growth are immeasurable. Clear goals foster a positive environment where subordinates understand expectations and feel empowered to grow. While potentially time-consuming, written counseling establishes a transparent dialogue about performance between leaders and their subordinates.

**Table 3-1. Counseling Resources<sup>11</sup>**

Resource	Location
Army Human Resources Command (latest regulation and career guidance)	<a href="https://www.hrc.army.mil/">https://www.hrc.army.mil/</a>
Army Coaching Program	<a href="https://talent.army.mil/acp/">https://talent.army.mil/acp/</a>
Center for Army Leadership (counseling tools)	<a href="https://cal.army.mil/">https://cal.army.mil/</a>
Athena Leader Self-Development Tool	<a href="https://cal.army.mil/Athena/sd-tool/#/">https://cal.army.mil/Athena/sd-tool/#/</a>
Army Career Tracker	<a href="https://actnow.army.mil/">https://actnow.army.mil/</a>
Army Leadership Exchange (articles)	<a href="https://alx.army.mil/">https://alx.army.mil/</a>
Examples of 5-year Career Plans	<a href="https://www.army.mil/article/240876/asm_5_year_timelines">https://www.army.mil/article/240876/asm_5_year_timelines</a>

As you guide the staff's development, embrace opportunities for them to stretch their capabilities. Encourage junior Soldiers to conduct staff analysis and brief at levels exceeding their current grade or position, providing supportive coaching and understanding when mistakes occur. This investment in their development yields significant long-term returns. The XO and S-3 should also consider self-development goals. What skills are required for future missions or training that you need to research or increase your expertise on. Be prepared to assume roles for your counterpart in their absence as you cannot be ignorant of what they are doing.

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<sup>11</sup> Author generated.

## Chapter 4

### Training the staff

While the battalion commander bears primary responsibility for staff training, the executive officer (XO) and S-3 frequently oversee its execution. The XO and S-3 should prioritize training that develops efficient staff systems and processes, directly enabling sound decision making by the commander.

#### Apply the Army's Collective Training Principles to Staff Development:

- **Define expectations clearly.** What specific tasks and standards must the staff achieve.
- **Assess current proficiency.** Conduct evaluations or assessments to establish a baseline.
- **Design and conduct training.** Implement individual and collective training events that elevate proficiency to meet the defined standards.
- **Reassess and refine.** Regularly evaluate collective capabilities and determine future training needs, focusing on new priorities or enhancing proficiency in critical areas.

Importantly, staff training does not end with a declaration of mission accomplished, it demands continuous attention. Proficiency naturally fluctuates as the team cycles through training and mission execution. Furthermore, personnel turnover significantly impacts proficiency. Realistically, less than 25 percent of the staff will remain in the same roles within two years. Therefore, establish a staff onboarding training process to integrate new personnel, communicate expectations via standard operating procedures (SOPs), and disseminate established best practices and products within staff continuity books.

This chapter emphasized the critical role of assessing and developing effective staff training. This training process must be flexible enough to prepare new staff members during high-tempo operations (middle of a deployment or combat training center [CTC] rotation) or when it is difficult to assemble everyone together. Train the staff to master your systems and processes. As the XO and S-3 implement the commander's training plan, prioritize the following principles:

- **Continuous assessment:** Regularly evaluate personnel changes, new equipment/applications, recent training, and anticipated operational environments to tailor training.
- **Maximize opportunities:** Integrate staff training into all events, from classroom instruction to field exercises and live-virtual-constructive simulations, to refine processes, build confidence, and enhance realism.
- **Embrace realistic scenarios:** Challenge the staff with imperfect information, complex problem sets, and degraded conditions to mirror real-world operational complexities.
- **Adaptive training plan:** Adjust training complexity based on assessments, starting with basic principles and progressing to more challenging scenarios. Conduct thorough after-action reviews to identify areas for improvement.

### Defining Expectations when Building Proficiency

As we prepared for a summer National Training Center (NTC) rotation, I discussed with the brigade staff my desire to prepare to maximize the use of night operations and avoid planning major operations in the heat of the day. Our command teams embraced this guidance, and every unit executed culminating collective training events with an emphasis on night conditions.

We developed specific, measurable, achievable, realistic, and timebound (SMART) objectives including spending considerable time in the field refining our command post (CP) structures, night operations under strict light and sound limits, and enhanced goals for displacement and dispersion of our command post.

Our demonstrated proficiency in executing tasks correctly, regardless of external conditions, was an important aspect of our training plan. When required to execute an unplanned night displacement of our main command post while under contact from the enemy, the commander and I were confident the staff would be successful because our training had prepared us.

-CSM Ryan W. Roush

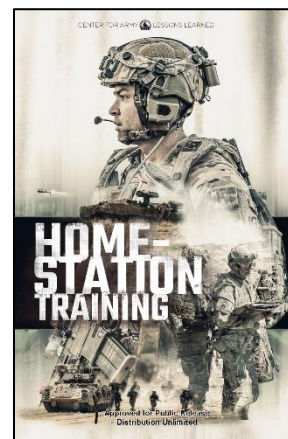
1st Armored Brigade Combat Team, 3rd Infantry Division<sup>12</sup>

For a more detailed discussion on building training plans see the new Center for Army Lessons Learned (CALL) Handbook: *Home Station Training*. This handbook also expands on building training in support of your mission essential tasks (METs) and digital systems that support training management.

### Collective Staff Assessment

Start your staff training assessment by reviewing your unit's METs and their supporting tasks. The Combined Arms Training Strategy (CATS) website is an invaluable resource for this.<sup>13</sup> It provides access to your unit's current collective task assessments, as well as the associated collective and individual tasks that underpin those evaluations.

To illustrate this process, we will use a generic combined arms battalion from an armored brigade combat team (ABCT) as an example. The CATS system provides valuable data that will help you develop a targeted training plan and evaluate your staff's proficiency.



<sup>12</sup> Interview with CSM Ryan Roush, 11 December 2024.

<sup>13</sup> <https://ssilrc.army.mil/combined-arms-training-strategies-cats/>

**Table 4-1. Generic Example of a Department of the Army  
Mission Essential Task List,  
Combined Arms Brigade ABCT <sup>14</sup>**

Center for Army Lessons Learned				
UIC: W0VP6A		TOE: 07315K100		
Mission: To close with and destroy enemy forces using fire, maneuver, and shock effect, or to repel his assault by fire and counterattack.				
Status: Approved Standard METL				
Name	Number	Next Scheduled Training	Last Scheduled Training	Assessment
07-BN-1272	Conduct Area Security - Battalion	Not Scheduled	No Record	N/A
17-BN-1030	Conduct an Area Defense - CAB (ABCT)	Not Scheduled	No Record	N/A
17-BN-1074	Conduct a Movement to Contact - CAB (ABCT)	Not Scheduled	No Record	N/A
17-BN-1094	Conduct an Attack - CAB (ABCT)	Not Scheduled	No Record	N/A
55-BN-4800	Conduct Expeditionary Deployment Operations at Battalion Level	Not Scheduled	No Record	N/A

The CATS system provides a comprehensive unit assessment of MET proficiency based on your submitted training data. When you input your unit identification code (UIC), the system compiles all relevant information. (Table 4-1 illustrates a generic unit's assessment with no training records displayed).

Reviewing your CATS assessments before training begins is crucial. This ensures you focus on the correct tasks to meet the commander's training intent and improve unit readiness. It also allows you to ensure you understand the conditions required to achieve readiness ratings.

After completing training, it is crucial to input the results into Digital Training Management System (DTMS).<sup>15</sup> This updates your unit's assessment within CATS, providing commanders with an objective, data-driven evaluation of their unit's proficiency in mission-essential tasks. While commanders retain some flexibility in their overall assessments, this data serves as a vital starting point for informed decision making.

Your unit's MET assessments are crucial for the following two key reasons:

- **Task organization and mission assignment:** The Army G-3/5/7 (operations, plans, and training) relies on these assessments to gauge your unit's ability to support specific taskings.
- **Army readiness:** Army Service Component Commands (ASCC) use MET assessments to evaluate your unit's readiness to execute Army missions.

Through the Unit Status Reporting (USR) system, both G-3/5/7 and ASCC review these assessments to ensure units assigned missions align with proficiencies and capabilities, thereby maintaining a high level of operational readiness (discussed in chapter 7) across the force.

**Note:** Realistic ratings are more important than positive ratings as these become justifications for assigning resources or articulating unit needs.

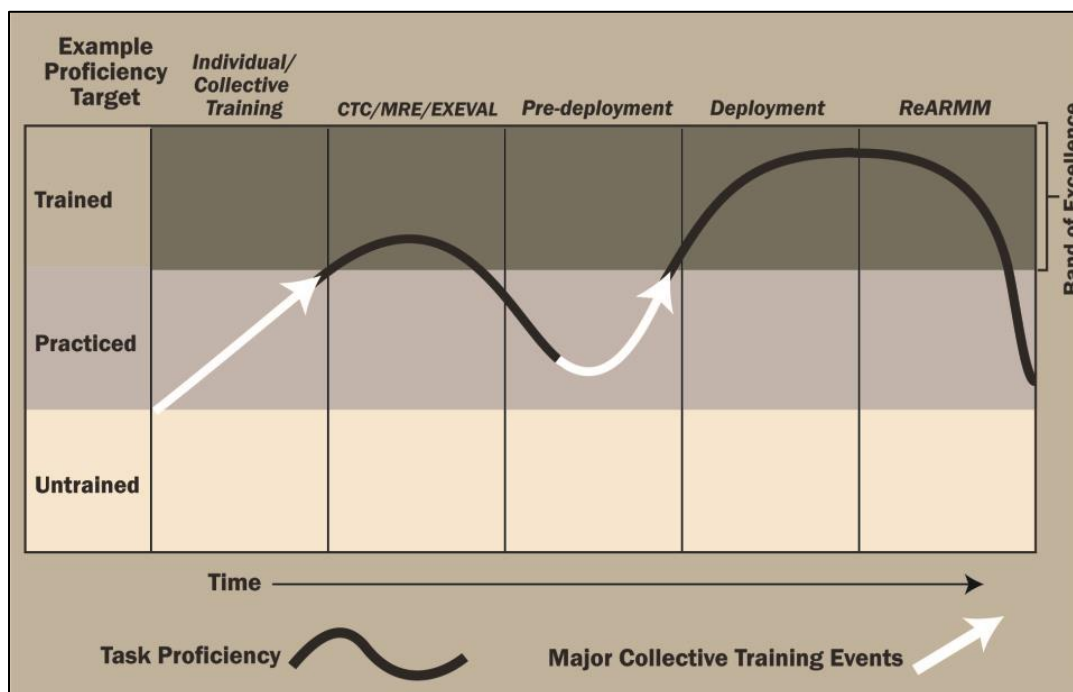
<sup>14</sup> U.S. Army Combined Arms Training Strategy (CATS) website, Mission Essential Task List (METL) Combined Arms Battalion, <https://atn.army.mil/ATNPortalUI/CATS/ViewCats?catsIdentifier=cf23f839-a1a8-4ded-a8cb-1d53b815315e>, accessed 1 September 2024.

<sup>15</sup> <https://federation.eams.army.mil/pool/sso/authenticate/l/15?f=c&m=GET&p=8907&r=f&u=https%3A%2F%2Fdtms.army.mil%2F&x=true>



## Individual Staff Training and Mastering Command and Control

Remember, the individual proficiencies of your staff directly impact your unit's MET assessment. Their ability to execute staff processes and operate command and control (C2) systems is critical. Regularly review your staff's proficiency ratings in conjunction with the quality and frequency of their training opportunities (Figure 4-1). This will help you identify training needs to meet readiness requirements.



**Figure 4-1. Unit Proficiency Ratings overlayed with ReARMM Cycle<sup>16</sup>**

Figure 4-1 illustrates how your unit's progression through the Regionally Aligned Readiness and Modernization Model (ReARMM) cycle directly influences staff proficiency. Training opportunities naturally increase as you progress toward mission phases, leading to higher proficiency levels.

However, personnel turnover is a constant factor that significantly impacts overall proficiency. Losses and gains in experienced staff members can make it especially challenging to achieve high proficiency standards early in the ReARMM cycle. Therefore, anticipating and mitigating the effects of personnel turbulence through actively managing personnel moves can be as important for key staff positions as it is for crew stabilization is for crew qualifications.

Effective C2 hinges on a tactical headquarters staff's mastery of its systems and processes. Begin by identifying the systems and processes you will utilize. Conduct a crosswalk of the individual and collective tasks that support those activities and support your unit's METs. This analysis will reveal the specific tasks your staff must master.

While system proficiency is essential, a staff must also understand the broader processes that enable the commander to understand, lead, and assess unit activities. This includes clear communication, information synthesis, and collaborative decision making.

<sup>16</sup> Author generated from FM 7-0, *Training*, 14 June 2021.

Battalion commanders can validate their command post capabilities using the progressive training strategies outlined in Training Circular (TC) 6-0.2 *Training The Command And Control Warfighting Function for Battalions and Brigades* 30 July 2025. This TC provides structured tasks and tables (example in Table 4-2) to build proficiency with their C2 systems and processes. Training tables contain digital crew, collective, and commander tasks that support sharing of information with subordinate and adjacent headquarters. In chapter 7, we'll discuss the functions of the command post these tasks are meant to support.

Early tables focus on building foundational proficiency at the individual, section, and cell levels. Tables I-II are on-going and occur when new staff members join the unit. Table V is where evaluators assess the staff (no external attachments or liaisons required) on collective tasks for the command post. The final two training tables (IX and X) necessitate external validation, often involving multi-echelon exercises. These exercises are crucial for assessing the effectiveness of battalion personnel and processes in establishing and operating within a larger C2 network. The TC discusses each step in greater detail. When conducting training you can use the training tables, in combination with T&EOs, to execute the training to standard and produce proficiency evaluations.

**Table 4-2. Command and Control Training Table<sup>17</sup>**

Method	Table	Commander	Staff	Command Post	Digital Crew
Cell and Section Based Training	I	Establish Organizational Business Rules and Develop Training Strategy	Organize and Acclimate Staff to the Organization	Conduct Pre-combat Inspection (Equipment and Maintenance)	Execute Basic Command and Control Information System Operations
	II	Establish the Training Environment	Develop Military Decision-Making Process Skills at the Section Level	Identify Command Post Characteristics	Integrate Command Post Systems
	III	Frame the operation	Establish Staff/Cell Processes and Integrate Warfighting Functions	Establish Command Post Infrastructure	Develop the Common Operational Picture
	IV	Prepare the Headquarters for Operations	Synchronize Command Post Operations	Conduct Command Post Survivability and Sustainability	Synchronize Operations
Collective Training	V	Drive the Operations Process	Conduct the Operations Process	Rehearse Command Post Operations	Conduct Command and Control System Rehearsal
	VI Certification	Assess and Certify the Headquarters	Conduct Staff Certification	Conduct Command Post Certification	Digital Crew Certification
Collective Training with Augmentees	VII	Direct Command and Control System Integration	Integrate the Command and Control System	Conduct Command Post Operations	Integrate the Command and Control System
	VIII	Command Forces and Control Operations	Synchronize Operations with Unified Action Partners	Sustain the Command Post	Synchronize Operations with Unified Action Partners
Formal Evaluation	IX	Command and Control Warfighting Function Validation Exercise Rehearsal			
	X Validation	Command and Control Warfighting Function Validation Exercise			

<sup>17</sup> Training Circular 6-0.2. *Training The Command And Control Warfighting Function For Battalions And Brigades*. p. 3 [https://armypubs.army.mil/epubs/DR\\_pubs/DR\\_a/ARN44461-TC\\_6-0.2-000-WEB-2.pdf](https://armypubs.army.mil/epubs/DR_pubs/DR_a/ARN44461-TC_6-0.2-000-WEB-2.pdf)

The collective tasks essential for effective C2 rely on operators who are true experts on their systems. Establishing reliable communication channels, operating C2 systems seamlessly, and maintaining a common operating picture are all crucial for situational awareness within the operating environment.

Your digital master gunner and knowledge manager play vital roles in collecting, analyzing, and disseminating information to all stakeholders. Train them effectively and empower them to optimize your staff's information flow.

The XO should ensure the staff are masters of their C2 systems and processes. While the Army continues to modernize its C2 structures, focus your staff's training on maximizing the effectiveness of current systems and processes to include:

- Validating command post activities and SOPs.
- Training new staff personnel in their roles and responsibilities.
- Building your bench for operators and leaders. Training alternates to increase flexibility when manning in dynamic environments.
- Becoming experts on the systems used to share information with higher, adjacent, and subordinate headquarters.
- Identifying limitations and constraints within those systems.
- Developing workarounds and processes to overcome challenges.
- Validating all battle drills, identifying those that are most difficult to accomplish and find training opportunities to improve.

#### **Best Practice**

##### **Staff's Training Nested with Collective Training**

- **Individual/team proficiency phase (crews/platoons):** Staff members focus on military decision-making process (MDMP), order development and dissemination, and internal rehearsals.
- **Collective training phase (platoon/company):** Staff members emphasize battle drill execution, battle tracking, and refining the rapid decision and synchronization planning (RDSP).
- **Force-on-force/live fire exercise phase (battalion):** Staff members concentrate on targeting processes, adjustment orders, and dynamic information management.
- **Note:** Frequently deploy the staff and operate in field conditions to validate your systems and equipment that facilitate C2.

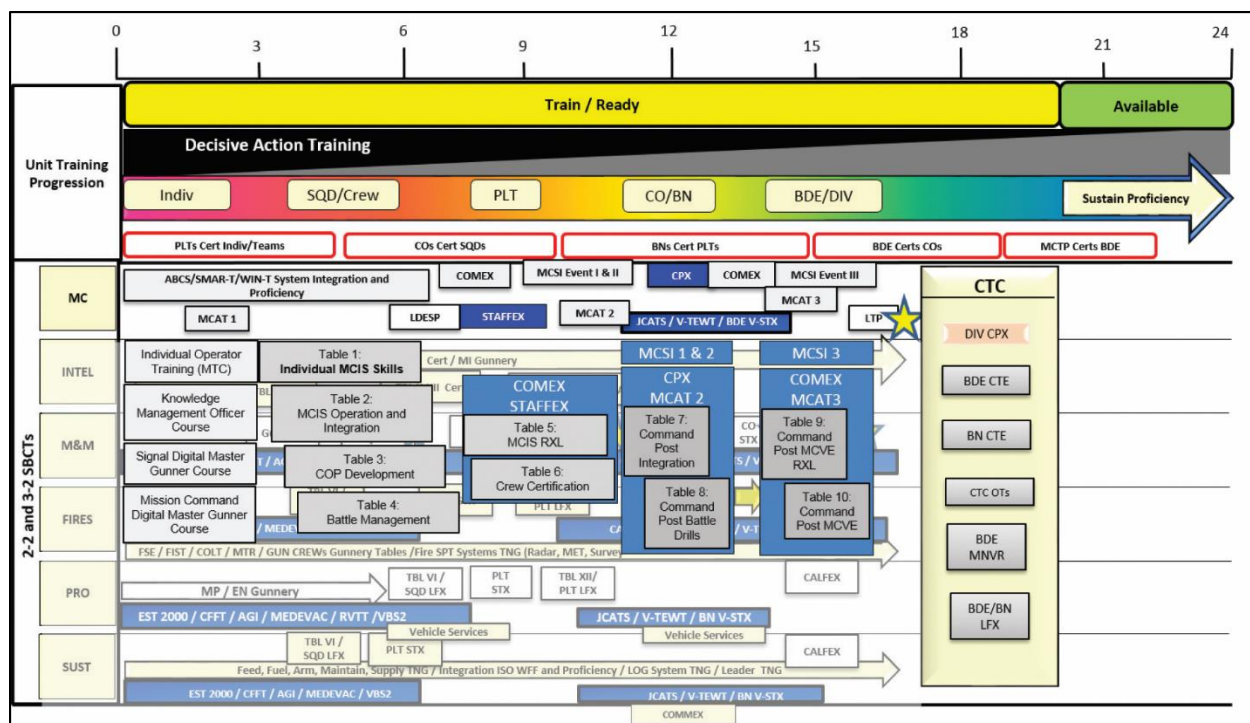


Figure 4-2. Mission Command Training Tables laid over Unit Training<sup>18</sup>

## Adapting Command and Control Training for Future Operating Environments

When planning individual and collective training, it's crucial to align with the commander's vision for exercising C2 in the operational environment. As units adapt to emerging threats and operational requirements, units deploying to CTCs are experimenting with modified CP configurations to support more agile and distributed C2. Chapter 6 will delve into specific CP modifications based on the increasing vulnerability of traditional CPs to near-peer adversaries. Individual training plans must account for any deviations from the prescribed modified table of organization and equipment (MTOE) or doctrinal C2 structures. For example, distributing staff personnel across multiple locations will likely increase the demand for skilled system operators. Therefore, cross training on multiple C2 systems becomes essential to ensure operational effectiveness.

As CP survivability becomes paramount in contested environments, staffs must prioritize seamless information sharing to include:

- **Avoiding stove piping:** Breaking down information silos within staff sections and between geographically separated CPs.
- **Adapting to modified CPs:** Adjusting duties, responsibilities, and processes to ensure a common operational picture across all CP elements.

<sup>18</sup> Training Circular (TC) 6-0.1, *Mission Command Information Systems Integration Training and Qualification: Digital Crews*, May 2018, page 4-8.

- **Cross-training for flexibility:** Given potential personnel shortages in certain military occupational specialties (MOSs), units must develop multi-skilled Soldiers capable of operating various C2 systems. This adaptability is essential for effective distributed and agile C2. Must integrate NCOs and Soldier to train at higher levels of responsibility to create flexibility.
- **Build your bench:** NCOs and Soldiers should be trained to perform all aspects of their staff functions, two levels above their duty position, as well as adjacent duties at their grade.

#### Best Practices for Individual Training of Command Post Personnel

- **Prioritize key training:** Make training functions, battle staff operations, and knowledge management a top priority for all staff personnel.
- **Plan Staff moves strategically:** Approach staff personnel moves with the same diligence given to vehicle crew assignments. Adjustments after certification training can create significant training gaps on the staff.
- **Establish a robust reception program:** Implement a battalion-level program for new staff Soldiers and leaders, focusing on:
  - Understanding unit SOPs and knowledge management procedures
  - Operating and maintaining all C2 systems
  - Reviewing unit staff products, battle drills, and reporting formats

#### Execute the Training Plan

Effective staff training does not happen by accident. Integrate it into your unit's training calendar using the 8-Step Training Model in any collective training event.

Find ways to maximize training opportunities. If your unit routinely publishes operations orders (OPORDs) for major training events (Step 4 of the 8-Step Model) and leverage those events to conduct concurrent MDMP training for your staff. This reinforces their skills in a realistic context.

Practice conducting current operations and future planning even when training. While your current operations cell oversees the execution of on-going training, your planning cell plans your next collective events, producing orders and execution products. Units transition those orders between plans and operations during OPORD briefs or rehearsals with subordinates. This fosters confidence in the order process and between cells. Once you have advanced beyond the basics, train to execute transitions while CPs are geographically separated.

Avoid the temptation to train in a distributed manner too early in the staff's development (particularly if you are in a ReARMM cycle). Instead, consider their current competency level and apply a crawl-walk-run approach as listed below:

- **Crawl phase:** A newly formed staff benefits from focused instruction on processes and minimal distractions.
- **Walk phase:** As the staff gains experience and cohesion, gradually introduce more complexity, such as time constraints or limited information scenarios.
- **Run phase:** A highly proficient staff should be able to effectively operate in distributed and austere conditions, producing quality staff products, maintaining situational awareness, and directing forces with minimal guidance.



By deliberately planning and executing staff training, you develop and empower your team to execute C2 in degraded environments. Units should prioritize training that builds proficiency in SOPs for C2 functions. This training should begin with familiarization of existing SOPs and progressively increase in complexity. For example, staff exercises can simulate transitions between CP nodes (from Main CP to Tactical CP) and build towards order dissemination over virtual networks.

Consistent use of tactical C2 systems, even in garrison, fosters familiarity and rapid troubleshooting skills. By routinely exercising these procedures, a staff develops the resilience necessary to maintain C2 in dynamic and contested environments, contributing to overall mission readiness.

Resource your staff's training and development. The battalion staff should develop effective training products such as orders for subordinate units. XO/S-3s should consider refining their orders processes while supporting collective training through iterative learning and feedback with companies.

### **Capturing Lessons and Fostering Continuous Improvement**

The XO or S-3 must capture lessons learned and translate into improvements to staff processes. Avoid repeating mistakes and maintain continuity as personnel transition by capturing lessons from staff training events. This process should mirror how you capture lessons from all unit training conducted for continuity and future reference.

#### **Best practice for XO/S-3 guiding Staff After-action Reviews**

- Follow subordinate unit and section AARs to allow inputs from lower echelons.
  - Ensure attendance by key stakeholders, attachments, leaders and operators.
1. Question: Are our processes effective across all levels of our communication plan, ensuring seamless interaction with higher and lower echelons?
  2. Question: What adjustments are needed to our processes or systems, including duties/responsibilities, SOPs, knowledge management procedures, or battle drills?
  3. Question: Can we implement these changes before our next staff training event to validate their effectiveness?
  4. Question: What areas require additional staff training, both for specific staff sections and the staff as a whole?

Assign an individual responsible for implementing each identified adjustment. By fostering a culture of continuous improvement through consistent reflection the staff would adapt more rapidly to evolving challenges. Establish timelines for adjustments to ensure changes are implemented. If you captured lessons learned effectively, you should be able to review the last assessment before building training, allowing your unit to address shortfalls and review implemented changes before training.

### **Balancing Training: Core Competencies and Specialized Skills**

The XO/S-3 must champion low-density MOS training. Resistance to properly resourcing this training may arise because most members in these fields often work at the staff level or in the headquarters and headquarters company. Therefore, the XO/S-3 must effectively communicate

the importance of this training to subordinates units and create integrated training opportunities into the battalion's overall training plan. This integration requires the following:

- **Expectations:** Clearly articulate the necessity of specialized training (particularly those tasks/functions that are outside your core competencies) and its potential impact on unit readiness.
- **Synchronize staff training:** Staff section brief XO/S-3 on all individual training. Utilize Sergeant's time training to bring cross-unit MOS together. Synchronize with outside units, particularly within the brigade.
- **Creative scheduling:** Seek opportunities to integrate specialized training with existing events or leverage virtual training platforms to minimize disruption.
- **Long-term vision:** Consider the full range of operational environments the unit might deploy to when developing training objectives, ensuring that Soldiers are prepared for diverse challenges. By effectively balancing core competency training with the development of specialized skills, commanders and staff can build a more versatile, resilient, and lethal force. Cross training prepares units for the complexities of modern warfare:
- **Recovery operations:** While maintenance personnel play key roles in recovery, training all Soldiers on self-recovery techniques enhances unit resilience and ensures safe recovery procedures.
- **Casualty evacuation:** Training non-standard methods for casualty evacuation (CASEVAC), training all Soldiers on buddy aid and prolonged field care can significantly increase survivability. Training cross-unit formations on roles for casualty evacuation including how to respond during mass casualty events that overwhelm subordinate capabilities.
- **Call for fire:** Fires supporters training squad leaders and vehicle commanders ensures a broader base of technically proficient personnel. Utilizing multiple means of identifying and relaying targeting data to firing systems.
- **Chemical, biological, radiological, and nuclear:** Training on employment of detection equipment to support unit reporting, training procedures for use of chemical, biological, radiological, and nuclear (CBRN) related equipment, proper inspection techniques for serviceability, and training procedures for operating in contaminated environments.

### **Chemical, Biological, Radiological, and Nuclear Proficiency in Large-scale Combat Operations**

U.S. Department of State reporting shows repeated use of chemical agents by Russia in the war with Ukraine. A tactic frequently used was the use of chemical agents in the form of chemical agent grenades dropped from unmanned aircraft systems (UASs).

When attacking static defensive positions, Russia dropped chemical grenades into Ukraine trenches. Once the Ukrainian soldiers exited their trenches due to a lack of [protective] masks, the Russians would follow up with artillery strikes and ground assaults. Several Ukrainian withdrawals from prepared defensive positions occurred after Russian forces used this tactic.

U.S. State Department Global Engagement Center <sup>19</sup>

<sup>19</sup> State Department Global Engagement Center, "Russia Spreads Disinformation to Cover Up Its Use of Chemical Weapons in Ukraine", [www.state.gov](https://www.state.gov), 7 June 2024.

Low-density training prioritization will occur based on guidance and time allocated by the S-3. To optimize limited resources and personnel, treat low-density training as a battalion requirement directed through orders to synchronize efforts amongst competing demands.

**Best Practices to Optimize Training for Low-density MOSs**

- Schedule routine low-density MOS training requirements on the battalion calendar and coordinate resources.
- Ensure the staff briefs low-density MOS training plans to the XO, S-3, or operations (OPS) sergeant major (SGM) before briefing commanders.
- Incorporate low-density MOS tasks into culminating training events to assess unit preparedness.
- Leaders at the battalion level should observe low-density MOS training during execution to ensure quality and share lessons learned.

## Chapter 5

### Training the Planning Process

We will focus on training the planning process in this chapter. The lessons applied from this chapter should inform you as you build your unit standard operating procedure (SOP). Since unit SOPs will cover a combination of planning, field and garrison activities. The specific development of SOPs is covered in Appendix A.

In preparing for battle, I have always found that plans are useless but planning is indispensable.

– GEN Dwight D. Eisenhower  
Commander-in-Chief of Allied Forces, World War II

The Army has three primary planning models:

- Army design methodology (ADM)
- The military decision-making process (MDMP)
- Troop leading procedures (TLPs)

Leaders select the most appropriate model based on their echelon and the available planning time.

**Army design methodology:** ADM is a conceptual planning model typically employed by senior headquarters to understand complex problems before attempting to solve them. This might involve situations such as the following:

- Assignment to a new area of operations
- Introduction of a new problem set
- Examination of a campaign plan

ADM results in a conceptual framework that guides the development of operational plans or orders, often using MDMP as the next step. This process frequently occurs well before operational forces engage in tactical planning. While ADM aims to identify root causes and shape conditions toward a desired end state, it can be time-consuming and require a deep understanding for effective implementation. The lack of available time and the limited flexibility to develop options limits the utility of ADM at lower tactical levels.

**Military decision-making process** is the Army's standard for battalion-level and higher planning. A key consideration for battalion staff using MDMP is ensuring their products effectively support their companies, who will likely employ TLPs for mission execution.

Establish a solid foundation in the basic steps by ensuring all staff members clearly understand their roles, responsibilities, and the process for developing orders. Once your staff demonstrates proficiency in the fundamentals, you can introduce more advanced MDMP applications, such as:

- Directed courses of action
- Decision point tactics
- Rapid decision-making and synchronization process (RDSP)

For valuable insights and observed best practices in MDMP, consult the Center for Army Lessons Learned (CALL) *Handbook 23-07, MDMP*.<sup>20</sup> This resource analyzes a unit's decision-making process during a notional Joint Readiness Training Center (JRTC) rotation, highlighting the impact of decisions on operational outcomes in the *Defense of Cajun Bayou*.<sup>21</sup>

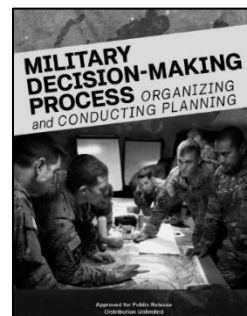
<sup>20</sup> Center for Army Lessons Learned (CALL), *Military Decision-Making Process*, November 2023.

<sup>21</sup> CALL 20-16, *Defense of the Cajun Bayou*, The Joint Readiness Training Center Operations Group, April 2020.

By understanding the benefits and drawbacks of each planning model, and by focusing on clear and concise communication, a battalion staff can set their companies up for success in the most demanding operational environments.

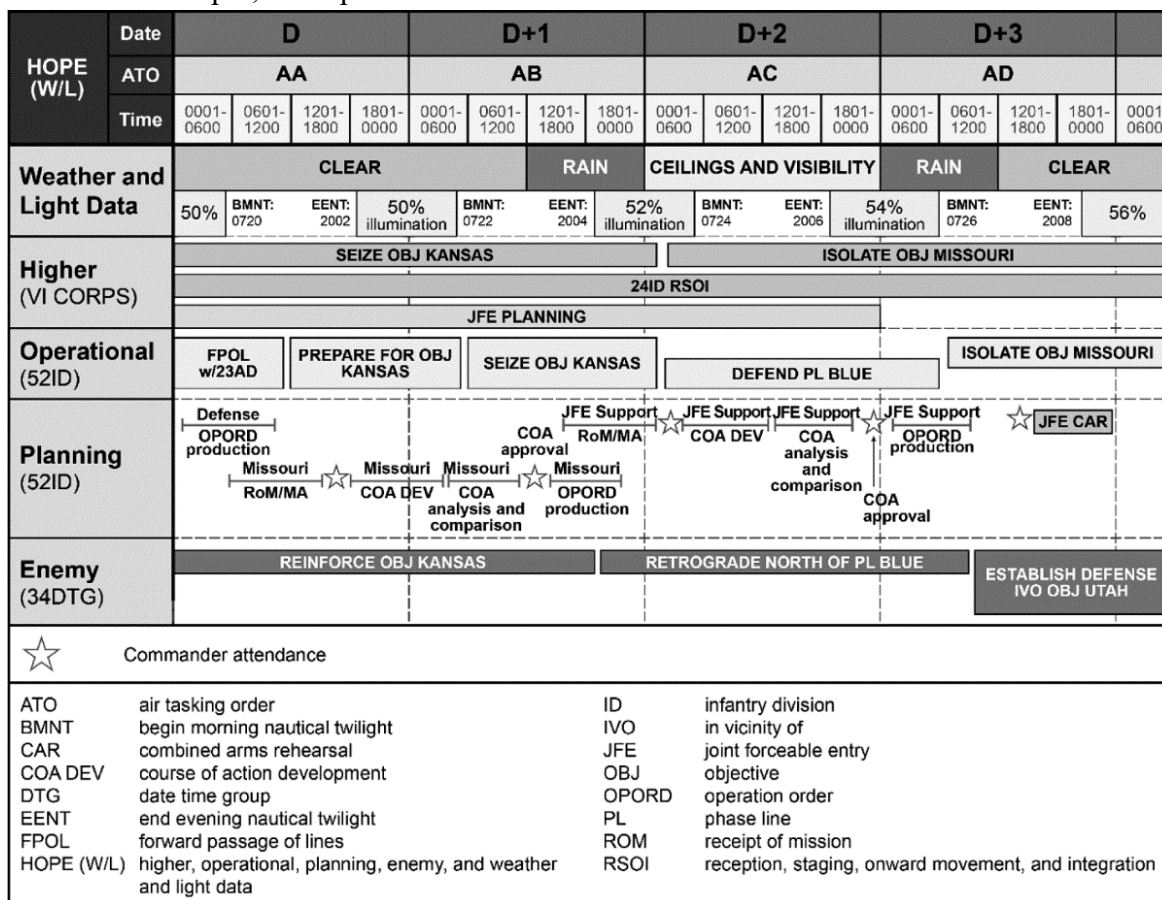
## Planning

In Chapter 4, Training the Staff, we discussed how to determine what tasks a staff needs to train, how to assess the staff's ability to accomplish critical tasks, and how to build a training environment for staff training. The following discussion on planning focuses on how to organize to conduct planning in the field, how to transition planning efforts to current operations for execution, and considerations for ongoing staff assessments of plans during execution.



The development of a dedicated staff planning timeline is arguably the most critical step executive officers (XOs) and S-3s can take to manage the complexity of the MDMF.

The following sections highlight specific best practices for key topics that rely on the XO and S-3 to support the staff in meeting the commander's requirements. One critical task that falls to the XO or S-3 is in Step 1, Receipt of mission: build a tentative timeline.



**Figure 5-1. Sample of Higher Operational Planning and Enemy Timeline<sup>22</sup>**

Creating a higher, operational, planning, and enemy (HOPE) timeline enables the staff to contextualize the mission within the broader operational environment (OE). As illustrated in

<sup>22</sup> Field Manual (FM) 5-0, *Planning and Orders Production*, November 2024, page 83.

Figure 5-1, a HOPE timeline correlates the unit's planning timeline with other operations, enemy activities, and environmental conditions. This initial version, developed during Step 1 of the MDMP, provides a foundational understanding of the activities occurring within the OE. As the MDMP progresses, subsequent updates to the HOPE timeline will incorporate additional unit activities such as:

- Deployment of reconnaissance, security formations following mission analysis (MA) and refinement of priority intelligence requirements (PIR)
- Movement of subordinates to new locations in anticipation of operations.
- Decision points
- Times for subordinate unit back-briefs and rehearsals
- Command post displacements (all echelons)
- Other relevant events and milestones impacting planning/execution

Maintaining this timeline as a dynamic informative tool supports the staff's planning and decision-making efforts throughout the MDMP, as well as the visualization of the operation.

This timeline isn't simply a schedule. It is a tool for tracking the numerous and often simultaneous sub-steps within the MDMP. A planning timeline helps to ensure the staff delivers a complete order with sufficient lead time for subordinate units to plan and prepare. This tool gives the XO/S-3s the visibility and control necessary to manage the planning process. A planning timeline allows the XO/S-3 the following:

- **Account for MDMP sub-steps and quality control:** Specifically allocate time for each MDMP sub-step to include sharing assessment and recommendations amongst the staff. Require submission to the XO or S-3 for review before considering the step as complete. This ensures quality and prevents missing tasks.
- **Identify bottlenecks:** Actively monitor the progress of each sub-step to identify potential bottlenecks or delays before they impact the overall planning process. Early identification of delays allows for timely intervention and resource allocation.
- **Prioritize efforts based on impact on others:** Prioritize work based on expected completion times and the impact on critical collaborative products. Focus early efforts on tasks that unlock subsequent steps (such as reverse warfighting functions worksheets that directly inform threat analysis, or the mission combined obstacle overlay impacting both friendly and threat analysis).
- **Direct inexperienced staff:** Provide a clear understanding of planning process expectations and timelines for inexperienced staff members. This fosters professional development and enables them to effectively manage their workload and meet deadlines.
- **Accelerate MDMP through preparation:** Empower the operations sergeant major/noncommissioned officer (SGM/NCOIC) to prepare for upcoming MDMP steps by gathering required materials (intel products, templates, maps, blank overlays, etc.) and establish the dedicated collaboration spaces prior to each step, accelerating planning and minimizing transitions.
- **Enable timely subordinate planning:** Ensure the timely production and dissemination of key products (warning orders, operations orders, and overlays) to allow subordinate units to initiate their TLPs, including reconnaissance that initiates movement before the final order is issued.

Optimal staff learning and plan refinement events occur when the commander actively engages throughout the MDMP, extending beyond key briefings following MA, course of action (COA) Development, or order issuance. Building a planning timeline that maximizes commander input



requires XOs to deeply understand both the commander's intent and their battlefield circulation plan. Successfully navigating this requires a nuanced approach to balancing commander availability with the critical need to meet order issuance deadlines.

**Best practices for XO to ensure Access to Commander during Planning**

- Ensure the commander approves and understands the staff planning timeline.
- Equip the commander to make informed decisions regarding potential delays, clearly outlining the associated cascade impacts on order issuance and subordinate unit preparation.
- Shape the commander's battlefield circulation plan to strategically integrate their presence into key MDMP steps. Prioritize circulation to areas with units that will significantly impact plan development, focusing on gaining a deeper understanding of the operational environment and friendly capabilities.
- When the commander's availability is limited, schedule concise, focused desk-side briefings with key leaders to review step results and solicit guidance. This maintains planning momentum while ensuring continued commander oversight.
- Rapidly disseminate the commander's adjustments and guidance to the staff when issued to limited audiences. Delays in feedback can lead to wasted effort and require rework, creating further impacts to the planning timeline.

The XO is the central figure in managing the staff planning timeline. Their experience is critical in synchronizing staff actions, commander availability, and deadlines to issue orders. This delicate balance requires seasoned judgment. Throughout the process, the XO must consistently reinforce the commander's intent to the staff, ensuring all efforts remain aligned with the overall vision. This is particularly important during periods of limited commander availability.

MDMP demands the XO anticipates the commander's needs, manages staff activities, and maintains a relentless focus on timely order issuance. Ultimately, the success of this model hinges on the XO's ability to leverage their experience and judgment to effectively plan and issue guidance in dynamic operational environments.

XOs build efficiency by developing tools that serve multiple purposes throughout the planning process. For instance, the enemy order of battle, enemy situational template (SITTEMP), and mission combined obstacle overlay (MCOO) are all critical components of mission analysis. XOs should ensure they will be adequate to also support COA analysis, order production, and current operations.

S-3s ensure products developed during COA analysis, such as proposed task organization, concept of operations, fire support plans, and associated graphics can seamlessly translate into the execution paragraph and annexes of the operations order (OPORD). S-3s ensure terminology, graphics, content, and clarity of these products support seamless transition into the OPORD and overlays.

## **Rehearsals**

Rehearsals provide an opportunity for the unit to practice their plan prior to execution, identify areas for improvement, and adjust before mission execution. CALL handbooks on MDMP and Rehearsals provide a deeper discussion of rehearsal formats, methods, and considerations.

### Best Practices for XO/S-3s when organizing Rehearsals

- Focus on critical tasks, key events, or complex situations to ensure synchronization between all stakeholders.
- The S-3 should ensure a method to record all adjustments identified at the rehearsal.
- The XO should approve injects based on commander's guidance about "what now" scenarios will be discussed.
- Following the rehearsal, the XO will assign specific individuals/sections to publish adjusted products to address any outstanding issues as part of a fragmentary order following the rehearsal.

Rehearsals require time for subordinates to prepare after the order is issued. Include time for dissemination of products down to the lowest echelon. The XO and S-3 should be honest about the time required to disseminate and prepare for rehearsals when developing the planning timeline.

CTCs routinely report units providing inadequate time between receipt of mission and execution, with companies having inadequate time to rehearse prior to an operation.

One of the challenges leaders must address is balancing the risk associated with methods for conducting rehearsals with the value of synchronizing operations. Threat assessment may eliminate the feasibility of certain types of rehearsals or impose other limitations. The XO makes recommendations to the commander about the staff's assessed risk and mitigations for executing rehearsals.

### Plans-to-operations Transition

XO is responsible for ensuring effective confirmation briefs. The S-3 is responsible for ensuring the current operations cell has the understanding and products to direct operations upon completion of planning.

Rehearsals serve as the normal transition point from plans to operations. Attended by all parties, they represent the point when the staff and subordinates have synchronized the operation and all final tasking for coordination are identified.

Your unit SOP should contain a plans-to-operations checklist to ensure effective transitions. Following the order, individual staff sections should conduct a confirmation brief acknowledging tasks assigned, location of running estimate assessments, and order products for execution. The current operations leadership is responsible for briefing other shifts (if not present during the transition) as a part of the next shift change.

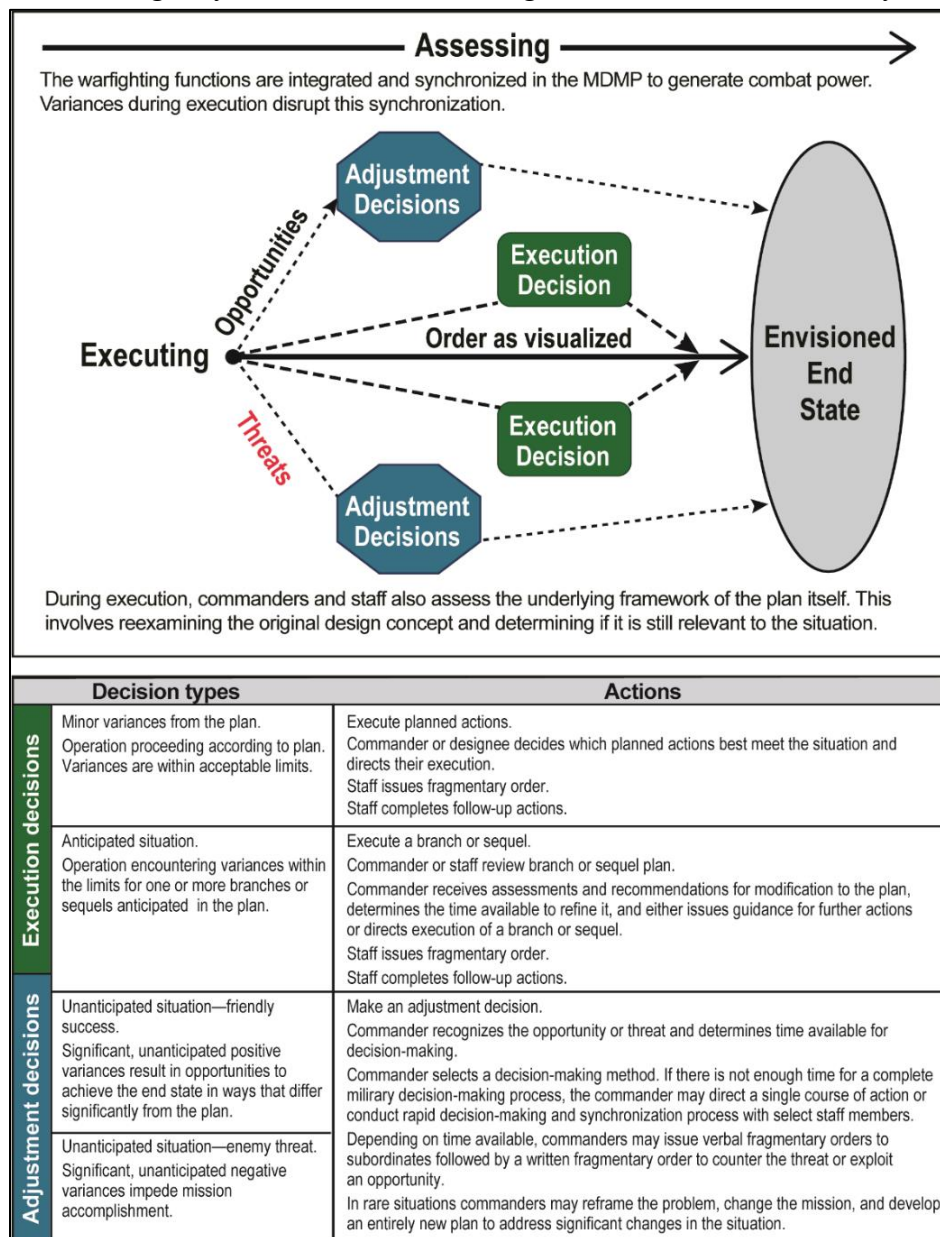
### Rapid Decision-making and Synchronization Process

CTCs routinely report units have a poor understanding of the differences between MDMP, abbreviated MDMP, RDSP, and when to apply each.

A complementary tool to MDMP, RDSP facilitates swift synchronization of activities in time-constrained environments. While the MDMP provides a comprehensive framework for planning, RDSP offers a highly abbreviated method for adapting to changing situations. Typically, the Current Operations team executes RDSP, with support from planners who are familiar with the base order.

To illustrate the RDSP process, consider Figure 5-2, which depicts how a unit may adjust its planned operation in response to emerging threats or opportunities. As the unit gains more information about the operating environment, the unit can execute pre-planned branches or sequels to anticipated threats or opportunities.

RDSP is for issuing unanticipated adjustments to the original plan to remain synchronized and achieve the commander's desired end state. The staff must quickly update their running estimates to address the new situation, synchronize their efforts to achieve the revised objectives, and issue guidance to subordinates. By leveraging RDSP, units can respond rapidly to changing circumstances, ensuring they remain effective and agile in the face of uncertainty.



**Figure 5-2. Adjustment Decisions** <sup>23</sup>

RDSP involves:

- RDSP is a process used to adjust an existing plan in response to changes in the threat or emerging opportunities.

<sup>23</sup> FM 5-0, *Planning and Orders Production*, November 2024, page 9.

- RDSP includes those changes to the order which you have planned for are branches or sequels and are planned, synchronized, and just need to confirm synchronization.
- RDSP includes those changes which require new orders (adjustment decisions) issued to synchronize efforts and direct forces to address the new conditions.
- RDSP is not a replacement for the MDMP, but rather a way to update an existing plan to ensure it remains relevant and effective.
- RDSP is for when the existing plan is still valid but requires minor adjustments to account for changes in the OE .

To clarify, RDSP and Abbreviated MDMP are two distinct concepts. Where RDSP is about adjusting a developed plan, abbreviated MDMP is shortening the process deliberately based on conditions such as limited time available:

- **Abbreviated MDMP:**
  - Abbreviated MDMP refers to the process of skipping or reducing the time spent on certain steps of the MDMP to develop a new plan quickly.
  - Use this when the commander needs to plan rapidly, and there is not enough time to complete the full MDMP process, or the mission planning is relatively simple.
  - Abbreviated MDMP involves making a deliberate decision to assume risk by reducing the time spent on analysis and planning, to achieve a faster planning/decision-making cycle.
  - Commanders select this approach only when they are confident that the reduced analysis and planning is necessary to prevent a greater enemy threat.

#### **Best practices directing Staff to RDSP or Abbreviated MDMP<sup>24</sup>**

- **Clearly define the purpose and scope of RDSP and abbreviated MDMP:** Ensure that the staff understands the differences between these two concepts and when to use each.
- **Establish clear criteria for when to use RDSP vs. abbreviated MDMP:** Direct execution based on the level of significance of changes or the urgency of the issuing a new plan.
- **Monitor and evaluate the effectiveness of RDSP and abbreviated MDMP:** Regularly review the effectiveness in achieving the desired outcomes and adjust as needed to improve the process through staff AARs. Did the products allow subordinates to execute within the commander's vision and intent?
- **Develop a staff culture that is aware of risk:** Be aware of the risks associated with using abbreviated MDMP and take steps to mitigate them to include clearly identifying the assumptions and limitations of the reduced planning timeline.

RDSP must be trained as a separate process, focused on understanding the planning requirements in a time constrained environment to build proficiency and trust between commander and staff. The battalion tactical command post may be controlling all or part of the operation, some staff sections may not have full representation, some planners may not be available, etc. Both the XO and the S-3 must be prepared to execute operations with limited staff. Train the primary staff on the process and execute in different configurations to confirm proficiency.

#### **Avoiding Groupthink in MDMP**

**Red teams** challenge an organization's plans, strategies, or assumptions by dedicating a group of individuals to consider the plan from the perspective of an adversary. The goal of the red team is to identify potential vulnerabilities and weaknesses in your plan.

<sup>24</sup> Ensure staff proficiency in MDMP as the starting point. The staff should be well-versed in the MDMP before training abbreviated MDMP or RDSP.

For additional resources or training in red-teaming, refer to the latest version of the *Red Team Handbook* (version.9.0), U.S. Army Transformation and Training Command (T2COM) G-2.<sup>25</sup> Once you are familiar with the concepts of red teams, some of the principles can help your staff with MDMP. The goal is to anticipate enemy reactions to your activities; this allows the staff to refine courses of action by adding tasks or controls measures to reduce risk to accomplish the mission.

Some of these red-teaming principles exist in the activities recommended with a COA analysis. The COA analysis provides a chance for S-2's enemy team to respond to the actions described in that turn of wargaming. These inputs allow all warfighting functions to adjust friendly activities to reduce the risk from potential enemy actions.

Red-team principles are particularly valuable if any of the following conditions occur:

- Staff members are writing an order based on a single or directed COA
- During mission analysis there was insufficient time spent on understanding the enemy's capabilities across all war-fighting functions or enemy techniques, tactics and procedures (TTPs)
- Staff members do not have sufficient time to conduct detailed wargaming

While the red-teaming course can help train parts of the staff to challenge implicit or explicit assumptions, at the battalion level the XO and S-3 will rely on personnel who are untrained. Consider how you will train your staff to identify potential vulnerabilities and weaknesses to plans; the red team's purpose is not to argue against every staff recommendation but point out where a plan needs additional refinement.

**Best Practices for Challenging Military Decision-making Process Outputs  
(Specifically during Wargaming)**

- Define roles and assign key personnel:  
**Battalion XO (facilitator and arbitrator):** The XO provides guidance to the team and helps to adjudicate actions when there is disagreement between red-team and others on the staff. Provides time within the planning timeline dedicated to red team activities.  
**Team Lead (often from S-2 section):** Uses knowledge of enemy capabilities, TTPs, and enemy SITTEMP to guide enemy actions and defines enemy's objectives and intent to apply capabilities against friendly COA(s).  
**S-3 planner:** The planner is familiar with the concept of the operation and draft COA for friendly forces.  
**Others as necessary:** Members of the S-1, S-4, S-3, S-6, and medical officer can address aspects of the concept of support, protection, command and control, and fires for friendly COA(s).
- Focus on key vulnerabilities within the friendly plan. Simulate adversary actions using systems available in a manner consistent with their operating concepts.
- Evaluate the friendly plan against the enemy likely responses to make improvements or adjustments. The time invested in challenging your planning assumptions identify weaknesses in the current plan.
- Develop a more nuanced understanding of your adversary's capabilities and intentions.

XO/S-3s train staff processes to support the commander, train the staff on the planning processes and how efforts impact the execution, develop critical thinking to provide recommendations to the commander and understand complex problems.

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<sup>25</sup> <https://home.army.mil/wood/6115/8222/0759/RedTeamHB.pdf>.



## Chapter 6

### Tactical Activities

The best company commanders can out work the job and be successful. You can't do that as an S-3 or executive officer (XO), you need to manage work and lead people. If you try to outwork the job as an iron major, you will only hurt yourself and your unit.

LTC David P. Forsha  
Former Battalion Commander

Chapter 6 of the handbook focuses on field activities, which we define as 24/7 operations focused on accomplishing tactical missions. The chapter covers various topics, including command post configurations, current operations, and sustainment. This chapter provides recommendations on how to train for tactical activities.

The battalion XO and S-3 must recognize that the process concepts developed in either the field or garrison environment often have crossover implications. For example, units typically dedicate at least one day in garrison to maintenance activities and can surge personnel throughout the week to perform repairs or services. The culture of maintenance and vehicle services that begins in garrison operations carries over to the tactical environment. Instead of motor pool Monday in the field, you conduct continuous maintenance but many of the basic principles are trained in garrison.

Another example is tracking tactical operations and task completion. By mastering these principles in garrison, units can ensure the orders processes will work in field environments. By building transferable staff processes, the familiarity and expertise gained in garrison can pay dividends in the field operations.

### Command Post Configurations

Observations on command post (CP) survivability indicate that leaders must consider both operational effectiveness and risk when organizing CP operations. Future operations will demand more austere and mobile CP designs to survive in threat environments with persistent enemy observation.

Looking towards large-scale combat operations, units must be prepared to change their CP configurations; potentially reducing command and control (C2) systems and personnel while increasing dispersion. To address the limitations of traditional CP structures, units are shifting towards wireless-enabled, highly mobile, and austere configurations that can be quickly set up and torn down. The goal is to increase mobility and reduce the CP's signature to mitigate threat targeting by making it hard to detect.

The XO and S-3 can task the staff for the following:

- Provide an assessment of the electromagnetic spectrum (EMS) signature of CP in operation.
- Practice techniques to reduce their electromagnetic spectrum (EMS) signature, emitting false signatures as part of a deception or hiding within other EMS traffic, to make targeting more difficult.
- Disperse CP elements to avoid creating a traditional footprint of vehicles and tentage.
- Immediately employ camouflage to mask visual signature during short halts.
- Provide impacts of where and how functions may change when adjusting the CP configuration.



When training in garrison environments, staff can collocate and work collaboratively together to focus on learning unit standards for military decision-making process (MDMP) and other processes. This allows them to master the basics before training when distributed. By the time a unit attends a combat training center (CTC) rotation they should have evolved to operate in distributed CP configurations that support the commander while dispersed. The XO should use the final command post exercises (CPXs) before a larger validating event should fully implement and test any changes to CP design units are considering.

#### **Command Post Purpose and Function:**

- Define each CP's purpose and function for command and control, planning, and execution of operations. Some functions may be able to maintain redundancy with support at multiple locations, others may have to rely on sharing information from one CP.
- Identify how the CP will support the battalion's mission and operations, including providing situational awareness, making decisions, and issuing orders.
- Adjust the roles and responsibilities of each staff section to ensure effective communication and coordination when distributed.
- Develop a plan for sharing information among staff sections and other CPs when distributed, including the use of secure communication systems and networks.

#### **Integration and Continuity:**

- Determine how you manage routine activities from distributed command post such as battle tracking, reports, collaboration meetings, and planning. These must support activities with subordinate HQs as well as higher HQs requirements.
- Determine how the CP will manage tracking and control of operations from multiple or distributed locations.
- Develop a plan for continuity of operations (COOP) in case of breaks in communication, periods of emission control, or destruction of a CP.

#### **Survivability and Protection:**

- Identify the CP's survivability requirements, including the need for protective measures such as fortifications, concealment, mobility, and deception.
- Develop priorities of work for survivability including use of camouflage, cover, and concealment to reduce the CP's visual signature.
- CP displacement battle drill might include planning/recon of future location (even for emergency displacement) and pre-staging support materials to reduce movement requirements to occupy an alternate location.
- Consider the frequency and speed of displacement of a CP is required.
- Develop TTPs for creating false visual/electronic signatures at other locations to deceive the enemy targeting.

#### **Communication and Networks:**

- Determine the CP's communication requirements, including the need for secure and reliable communication systems and networks.

**Command Post Purpose and Function (continued):**

- Develop a plan for implementing these systems, including the use of encryption, secure protocols, and backup systems in case of system failure. Consider the use of alternative communication methods, satellite communications (such as Starshield) or messenger systems, in case of primary system failure.
- Develop a plan for protecting against cyber threats, including the use of firewalls, intrusion detection systems, and secure protocols.

**Support Requirements:**

- Identify the CP's physical security requirements including the use of internal/external guards, patrols, and access control measures and how those may affect a deception plan.
- Develop a plan for planning and executing sustainment of personnel and equipment, including the use of separate areas for rest and hygiene.
- Consider the use of alternative sustainment methods, such as airdrops or pre-positioned cache.

Developing a plan for managing personnel access to the CP prevents compromising location.

Based on survivability and distribution of personnel, you are more likely to see the staff split to more locations with collaboration occurring digitally. Conceptualize how you will organize to conduct your two most critical activities:

- controlling current operations
- planning

You must also consider where the XO and S-3 will operate and how they will support planning and operations.

**Current Operations**

Current operations allow units to maintain situational understanding within their operating environment (OE) and support the commander through the following:

- Monitor unit location and statuses, both inside the unit and of adjacent and higher HQs.
- Collect and disseminate information about the OE.
- Monitor task accomplishment towards unit objectives.
- Provide warfighting functions assessments about impacts to current plans based on unit reports.
- Synchronize or adjust resources to enable units.
- Issue new and fragmentary orders to subordinates.

The staff undertake these activities to help the commander understand the OE based on the evolving situation. An effective staff can process large amounts of data and information they receive to develop and share a common operational picture (COP) and common intelligence picture (CIP). The COP is critical because it synthesizes all the information the battalion receives to inform decision making. The staff cannot simply pass on reports, but they must apply their expertise to identify problems or opportunities (i.e., sort the compelling from the irrelevant).

A COP is defined as a display of relevant information within a commander's area of interest, tailored to the user's requirements and based on common data and information shared by more than one command. A COP is the product of information collection outputs, running estimates, and battle tracking. The COP provides a single identical display of relevant information shared by more than one command post and provides a unified understanding of the operational environment.

Some officers and noncommissioned officers (NCOs) lack fundamental understanding of the C2 systems. It wasn't about being experts but about knowing enough to maintain continuity when the dedicated C2 system operator was unavailable. Too often, staff leaders are completely lost when trying to update running estimates or provide critical information during battle drills, relying entirely on a single individual.

Remind your staff leaders to regularly check the common operational picture for accuracy, understand how to adjust running estimates based on changing conditions, and know where to find key staff products within the system. Simple things, like confirming data layers are correctly displayed or understanding the difference between planned and actual locations, can prevent significant misunderstandings and delays when it matters most.

– CSM (R) Ron Pruyt

To standardize the COP, units can develop a checklist of relevant information to be updated and always displayed. This checklist should include only information tailored to the commander's requirements, such as significant activities, maneuver graphics, fire support coordination measures, and sustainment nodes. By using this checklist, units can ensure that their COP is consistent and accurate, providing a shared understanding of the operational environment, particularly when enemy activity disrupts communication between units and CPs.

Define how frequently to conduct COP updates, how frequently to share information across staff sections for awareness. Determine what information is critical for sharing, and who is responsible for disseminating and how.

**Best Practices for a Common Operational Picture Product Checklist**

- Define how frequently COP is updated, and who is responsible. (e.g., battle NCO, every 30 minutes).
- Determine how frequently to update awareness between staff sections (e.g., every 2hrs in steady state, every 30 minutes in dynamic situations, or upon significant change).
- Determine what is tracked through analogue, digital, or combined.
- Specific items to cover:
  - Current enemy situational template (SITTEMP) with estimated and current locations
  - Status of commander's critical information requirements (CCIR) (both priority of intelligence [PIR] and friendly forces information requirements FFIRs)
  - Updated decision points (active or pending to include current assessment of staff recommendations)
  - Significant activities including unit locations and statuses
  - Maneuver graphics and other key graphic control measures
  - Active and planned fire support coordination measures
  - Active and on-order air space coordinating measures
  - Status of sustainment nodes and major supply routes
  - Any relevant civil considerations
  - Known and templated threats, hazards, and assessment of protection priorities

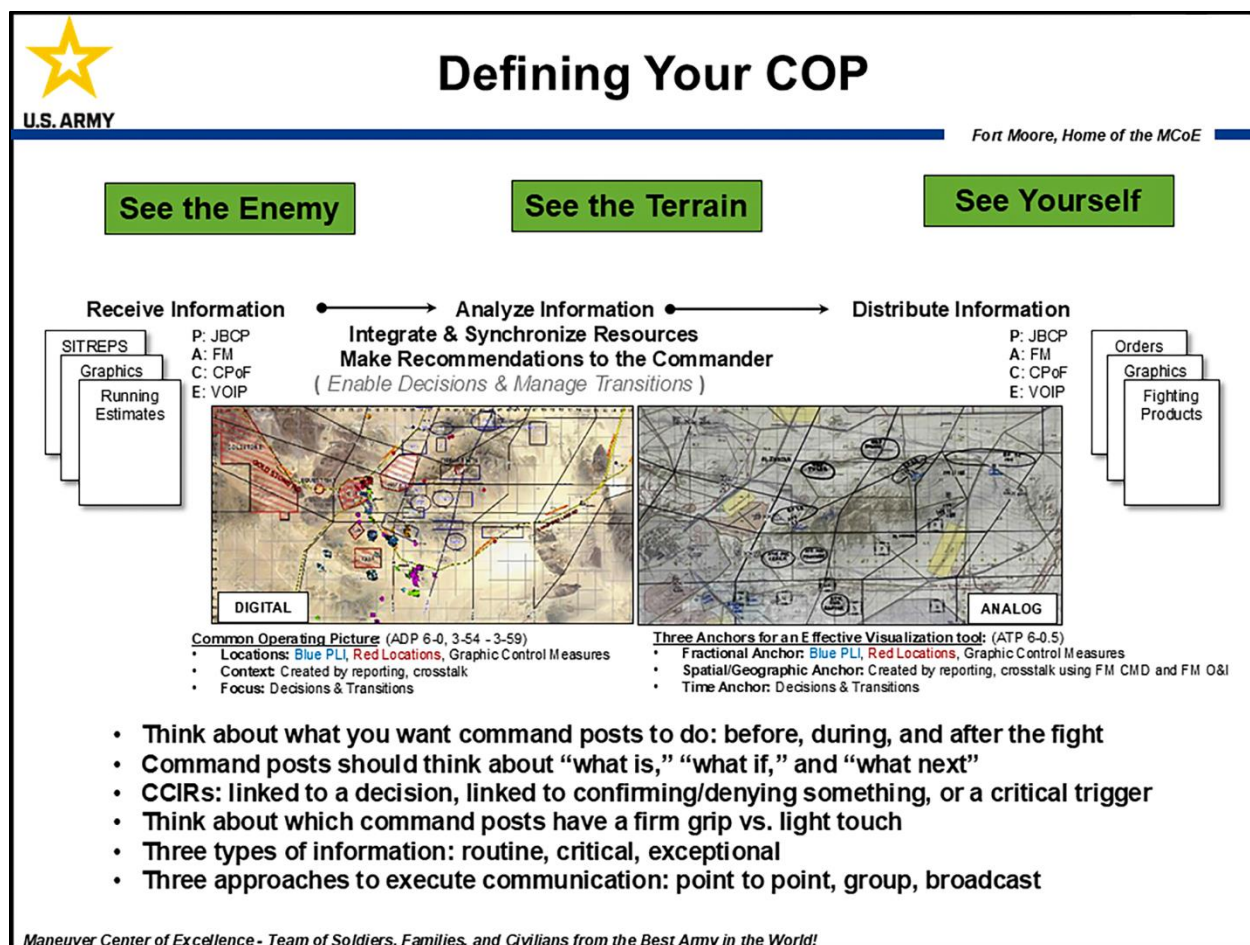


Figure 6-1. Defining Your COP<sup>26</sup>

## Running Estimates

The staff uses running estimates to continuously assess the current situation, using this process to determine whether current operations are proceeding according to the commander’s intent and if planned future operations are supportable<sup>27</sup>. Each staff section maintains their own running estimates, which can be a combination of written and visual products to monitor that inform the commander and others about the current situation.

As the operation progresses, each staff section continuously updates their base functional estimate, considering the effect of new information that pertains to the key elements, including:<sup>28</sup>

- Facts
- Assumptions
- Friendly considerations, including location, activity, and combat power of subordinate units from two echelons below them

<sup>26</sup> Taylor, Curtis MG "Fighting Your TOC from Commanding General NTC," Slide 9, [Fighting the TOC \(MG Taylor\).pptx](#), accessed 1 August 2025, discussion from a training center, available in the Joint Readiness Training Center (JRTC) toolkit.

<sup>27</sup> Army Techniques Publication (ATP) 6-0.5, *Command Post Organization and Operations*, March 2017.

<sup>28</sup> Ibid.

- Enemy considerations, including composition, disposition, and strength
- Civil considerations
- Conclusions and recommendations about associated risk

The staff running estimates provide a comprehensive and ongoing evaluation of the operational environment and the unit's ability to accomplish the mission. By continuously updating their estimates, staff sections can identify and mitigate risks, capitalize on opportunities, and ensure that the operation remains on track to achieve the commander's intent.

Furthermore, the running estimate process facilitates collaboration and coordination among staff sections. XOs must ensure each section is aware of the others' assessments and recommendations, and that the commander receives a comprehensive and unified view of the operational environment.

The running estimate is a critical tool in the military decision-making process, and its importance will only continue to grow as military operations become increasingly complex and dynamic. Staff sections provide planners and the commander with the insights and recommendations needed to achieve success in a rapidly changing operational environment.

### **Noncommissioned officer Roles and Responsibilities in the Command Post**

**Combat training center trends indicate units fail to fully leverage NCOs in their CPs.**

The XO, S-3 and operations sergeant major (SGM) play a critical role in mentoring and training junior staff personnel, helping to develop their skills and expertise. NCOs must train to execute the day-to-day operations of the command post, leverage technology to enable understanding, and contribute to processes and procedures that support unit activities. When the XO/S-3 leverages the expertise and experience of NCOs in the command post, they can play a vital role in enabling the unit to achieve its mission and objectives.

When XOs standardize NCO roles and training they become staff contributors. Empowered NCOs manage the flow of information, receiving, processing, and disseminating critical data to the appropriate personnel. They ensure the quick and accurate communication of information, enabling the commander and staff to make informed decisions.



**Best practices for XO/S-3s to Empower NCOs in command posts:**

**Articulate Clear Responsibilities**

- Define NCOs duties in support of their staff section as well as integrating processes such as planning or current operations.
- Assign additional duties and training for CP establishment, redeployment, and battle drills.
- Understand duties beyond CP functions, such as access control, local security, and logistics.
- Emphasize the importance of CP security. Train CP security tasks (such as access control, perimeter security, camouflage, improving survivability and deception)
- Emphasize support Soldier care principles: work/rest cycles, feeding, hygiene.

**Note:** Ensure unit standard operating procedure (SOP) outline NCOs' roles, responsibilities, and procedures for command post operations.

**Specific Training Goals for NCOs**

- Develop standardized training programs for NCOs to ensure consistency across different units and command posts.
- Train staff processes, including shift change, briefs, working groups and MDMP.
- Conduct regular exercises and drills to test NCOs' skills and preparedness, and to identify areas for improvement.
- Allow NCOs to cross-train with other units or specialties to broaden their knowledge and skills.
- Train to maintain an identical COP/CIP between distributed CPs.
- Provide training and development opportunities for NCOs to master C2 systems and provide training on new systems and tools to ensure NCOs are proficient in their use.
- Incorporate scenario-based training to simulate real-world situations, allowing NCOs to practice their skills and decision-making in a controlled environment.

**Note:** Emphasize situational awareness, cross-sharing information, and adaptability to changing situations, such as unexpected attacks or system failures.

**Foster Culture of Empowering NCOs**

- Pair experienced officers/NCOs with new/junior NCOs and Soldiers to provide guidance, support, and mentorship.
- Regularly evaluate NCOs' performance and provide feedback to help them sustain successes and improve areas of weakness.
- Provide opportunities for NCOs to develop their skills by attending advanced training courses (battle staff, Red team, etc.) or taking on leadership roles during training.

**Note:** Encourage continuous improvement, solicit NCOs to suggest changes and improvements to SOPs and CP operations.

**Decision Authorities**

Though common at higher echelons, a decision authority matrix (DAM) offers significant benefits for battalion CPs. A well-designed DAM explicitly defines who holds decision authority

for critical tasks and operations, empowering personnel to take decisive action even when communication with senior leaders is disrupted. This proves particularly crucial for battalions operating near the forward edge of battle, where electronic warfare threats like EMS jamming are likely.

By clearly outlining who can approve actions, direct operations, and reallocate resources, using a DAM fosters initiative among subordinate leaders and streamlines execution. This delegation allows the battalion commander freedom to operate away from the CP, confident that decisions made at the CP align with their guidance and operational priorities.

Table 6-1 provides a basic example of a battalion CP DAM. Units should refine this model during training events, tailoring it to reflect the commander's risk tolerance and preferred decision-making processes.

**Table 6-1. Example Decision Authority Matrix<sup>29</sup>**

Decision	Authority Level
Fire mission ground clearance/close air support (CAS) weapon release	Requesting Unit, battle captain
Fire mission air clearance	Commander, XO, S-3
Change of mission for Co level operations	Executive officer (XO), S-3
Request immediate rotary wing/fixed wing CAS	Battle captain, joint tactical air control (JTAC)
Coordinate cross-boundary operation with adjacent unit	Battle captain
Commit the battalion reserve	Commander, XO, S-3
Request medical evacuation	Battle captain
Designate a mass casualty event	XO, S-3
Displace to new position area for artillery (PAA)	Battle captain
Change route designation	XO, S-3

### Battle Rhythm

Establishing a unit battle rhythm is crucial for effective operations. Typically, the XO manages the battle rhythm, that supports the commander's decision-making process. The commander provides either directly or through the XO the criteria for developing the battle rhythm for the daily cycle to synchronize current and future operations. This guidance includes the types of meetings, attendees, outcomes, and delegated decision authorities for specific purposes or functions.

The XO designs the battle rhythm, arranging meetings and briefings in a logical sequence and timing that meets their preferences, higher headquarters requirements, and operational needs. The Commander, along with the XO and S-3, constantly assess the battle rhythm throughout the

<sup>29</sup> Author generated.

mission command training tables and unit events to meet the needs of the command, mission, and the operating environment.

Some common events that drive a unit's battle rhythm include:

- Commander's updates
- Staff updates
- Operational synchronization
- Collection synchronization
- Targeting meetings
- Logistics and maintenance meetings
- Shift changes

Organize these events to account for the unit's operational tempo, higher HQs information requirements, shift changes, and dispersed locations. Consider how dynamic planning, which occurs outside the routine daily battle rhythm (MDMP, rapid decision-making and synchronization process [RDSP], etc.), will impact the staff battle rhythm. The XO is the approval authority for changes to the battle rhythm. To establish a battle rhythm, stress the following:

- Prioritize tasks and focus on critical activities that support current operations.
- Analyze the time between events to determine if it allows sufficient preparation between events.
- Use technology, such as digital calendars and collaboration tools, to facilitate communication and coordination among staff members, particularly in dispersed locations.
- Implement knowledge management practices and version control to ensure effective sharing of information.
- Set submission deadlines. Empowered leaders, such as the operations sergeant major or battle captain must enforce product submission to facilitate integrated events.

By establishing a well-organized battle rhythm, units can synchronize activities, prioritize effective time usage, and avoid over tasking staff members. By leveraging technology and empowering leaders, units can create a battle rhythm that supports their operational needs and enhances their overall effectiveness.

### **Logistics**

The XO ensures coordination with outside agencies for resources, accounting for the requirements of subordinates executing direct actions, and conducting time-distance analysis to ensure on-time delivery are a few of the critical factors in providing good logistical support.

### Several key Observations from the ongoing Conflict in Ukraine

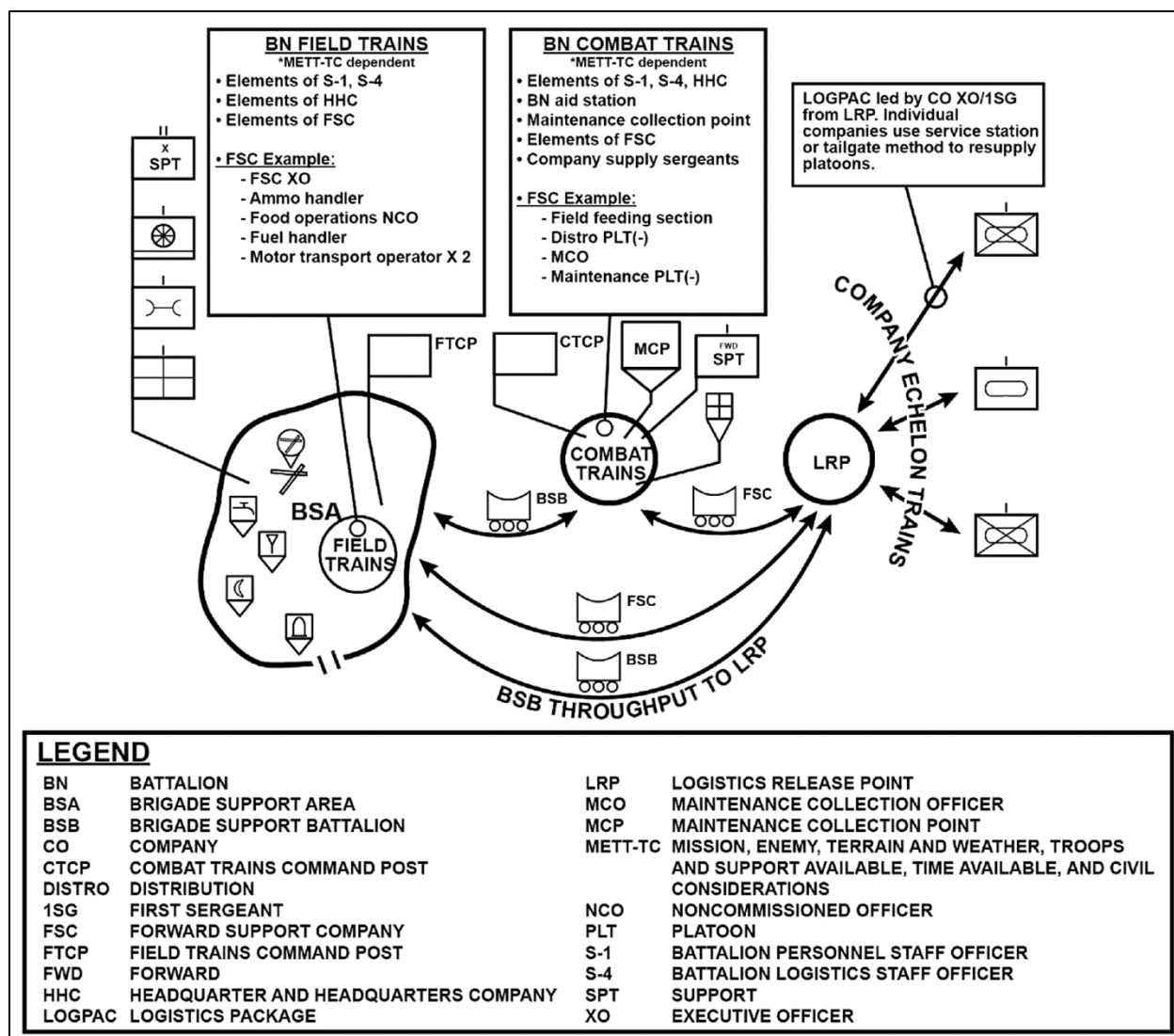
The ongoing conflict in Ukraine has provided valuable insights into the challenges that units are likely to face when planning logistics support in large-scale combat operations. Several key observations from this conflict have significant implications for logistical planning and include:<sup>30</sup>

- The widespread use of persistent observation, terminal guidance unmanned aircraft systems (UASs) and long-range fires has increased the risk for large supply areas operating close to the forward line of own troops (FLOT) forcing higher-level support locations to position farther back than doctrinally recommended.
- The tendency for groupings of vehicles to be rapidly targeted has severely restricted movement within dozens of kilometers of the FLOT.
- Casualties often require forward treatment for extended periods due to the difficulty in conducting casualty evacuation.
- Maintenance activities are frequently conducted forward or in place, as recovery vehicles are frequently targeted. All movement between the FLOT and support areas entails risk.
- Movement near the FLOT is limited to brief windows of opportunity, such as when significant electronic warfare (EW) jamming is active or during periods of bad weather that prevent the operation of short-range UASs.
- Ukrainian forces have employed unconventional logistics tactics, including the use of non-standard or non-military vehicles, activation of prepositioned cache points as needed, and walking of materials over the final dozen kilometers to or from the front. This approach is reminiscent of the tactics used by opposition forces at the Joint Readiness Training Center (JRTC).
- Recent observations point to the emerging use of unmanned ground vehicles (UGVs) and UAS to augment delivery of supplies forward.

The battalion XO provides oversight of operations and sustainment planning. During MDMP, the XO will review concepts of support to ensure they are feasible and capable of supporting the commander's plan. The XO monitors on hand quantities of supplies and matches them with consumption estimates with the support of the S-1, S-4, forward support company command team, and company XOs and first sergeants.

Ensuring that these running estimates are accurate, predictive, and shared with higher and adjacent HQs in a timely manner are key functions between the main CP, field trains CP, brigade sustainment cell, and the brigade support battalion support operations cell.

<sup>30</sup> Interview with Center for Army Lessons Learned (CALL) Sprint Collection Member, February 2025.



**Figure 6-2. Example of a Sustainment Command Post Configuration<sup>31</sup>**

Figure 6-2 shows an example of how units typically organize to deliver logistics. The field trains command post coordinates with the brigade support unit to receive and deliver classes of supply to the companies.

Common techniques for Army logistics include delivery directly to units at their current location, delivery to a logistic resupply point (LRP) for delivery by company internal assets (distribution point), or units moving to centralized location to conduct resupply in route to another location (service station). While each can be used based on a combination of factors with mission and enemy, the conditions of future operations may require new procedures to protect the force.

<sup>31</sup> ATP 3-90.5 *Combined Arms Battalion*, July 2021, page 6-7.

### Analyst Interview

In large-scale combat operations, logistics teams must adopt a predictive approach and carefully consider risk when authorizing emergency resupply missions. Relying on RDSP and fragmentary orders to surge support forward presents great risk against near-peer competitors.

Instead, planners and sustainers must anticipate requirements for supplies (what, when, and where). As logistical supply areas move farther away from forward units or become more dispersed, the capacity of support units to deliver logistics will decrease.

Logistic planners must synchronize operations to minimize risk to support units to account for increased enemy targeting capabilities. Higher headquarters can create additional windows of opportunity by synchronizing effects like electronic warfare and fires, beyond just exploiting favorable weather conditions.

This will require logistics teams to engage in a level of planning and synchronization comparable to that of air assault operations to reduce risk to unit movements. Failure to adopt predictive logistics approaches will put sustainment forces at significant risk on modern battlefields.

Center for Army Lessons Learned (CALL)  
Analyst Interview<sup>32</sup>

### Field Maintenance

XOs and staff can gain a deeper understanding of field maintenance by reviewing the CALL Handbook 23-08 *Leader's Guide to Maintenance and Services*. For units with high vehicle densities, consider the following key points:

- Ensure battalions establish and adhere to a reliable and effective Department of the Army (DA) Form (maintenance) 5888-flow processes in their maintenance SOP. Incomplete or delayed reporting can create a cascade effect that prevents repairs, so units must prioritize timely and accurate reporting.
- Develop effective communication plans with primary, alternate, contingency, and emergency (PACE) scenarios and establish C2 channels for maintenance reporting to prevent breakdowns in communication.
- Leaders must take an active role in quality control, overseeing the reporting process to ensure accuracy and completeness.
- Units must prioritize training on self-recovery techniques to reduce reliance on recovery sections and improve overall maintenance efficiency.
- Organize field maintenance teams to operate with companies forward, rather than consolidating them in support area locations, to facilitate fault verification and repair.

For more best practices on improving maintenance activities at the battalion level, refer to Chapter 7 of this handbook.

### Medical

The XO plays a vital role in planning, preparing, and executing casualty evacuation (CASEVAC) operations. The XO is responsible for ensuring that the battalion has a

<sup>32</sup> Interview with CALL Ukraine Sprint team member.



comprehensive CASEVAC plan, validated CASEVAC SOPs (often a part of a battalion's Tactical SOP), and has adequately rehearsed CASEVAC operations.

At the battalion level, the XO should collaborate closely with key personnel, including the battalion commander, command sergeant major, medical staff (surgeon, physician's assistant [PA], and Medical Platoon leadership), S-1, S-4, S-3, and other stakeholders to develop and implement the CASEVAC plan.

The company's XO should ensure that each company understands the CASEVAC SOP standards for establishing and marking casualty collection points as well as training combat lifesavers to assist in CASEVAC operations. The XO must also ensure that company leaders (first sergeants and company XOs in particular) are familiar with the battalion standards for casualty evacuation and medical care.

Regular rehearsals of CASEVAC operations with transfers of patients from company to battalion control, including executing under limited visibility conditions, treating chemically contaminated casualties, and mass casualty events (MASCAL) are essential to ensure that all personnel are proficient during execution.

### **Best Practices to Facilitate executing Casualty Evacuation:**

- Train combat lifesavers
- Ensure adequate medical equipment
- Develop a comprehensive CASEVAC plan
- Identify and assign CASEVAC teams
- Conduct regular rehearsals with identified teams
- Establish clear communication protocols
- Train for extended medical care at the point of injury

Training and leader development are essential components of effective CASEVAC operations. The XO and CSM should prioritize training and rehearsal of CASEVAC procedures to ensure all leaders are familiar with the principles of casualty evacuation and medical care. By prioritizing CASEVAC planning, preparation, and execution, the XO can help ensure that the battalion is prepared to respond effectively to casualties and provide timely medical care to those in need.

## **Conclusion**

The key S-3/XO takeaways from this chapter include:

- The importance of flexibility and adaptability in command post configurations
- The need for effective current operations, including monitoring unit location and status, collecting and disseminating information, and synchronizing resources
- The use of MDMP and the development of orders in planning
- The importance of logistics, maintenance, and medical operations in supporting field activities
- The need for coordination and planning in conducting field activities effectively

## Chapter 7

### Administrative Activities

The chapter focuses on garrison activities, which are critical to a unit's readiness and effectiveness. The chapter covers various topics, including the Command Supply Discipline Program, maintenance, unit status reporting, command and staff, garrison reporting, and areas of emphasis for the S-3 section. These activities drive much of a unit's actions when in the garrison environment.

In each of these areas, understanding unit processes to effectively manage actions is what the executive officer (XO) and S-3 are paid to accomplish. Building good processes leads to better outcomes.

#### Command and Staff

A common theme in command and staff meetings is the topics are briefed by staff sections, where each company provides relevant information to address the commander's concerns. For example, the S-1 (personnel) section may brief on awards, evaluations, personnel gains and losses, and other readiness metrics, such as Department of Defense (DD) Form 93 (personnel reporting) status. Confidential information, such as health issues, is typically briefed in private settings with key stakeholders.

Common agenda/topics for the command and staff meeting include the following:

- S-1: Personnel loss/gain, evaluations
- S-2: Clearances, arms rooms
- S-3: Taskings, critical training statistics, travel, unit status report (USR), public affairs
- S-4: Property book/inventory status, loss reporting, supply actions, budget
- S-6: Communication equipment status, computer access issues
- Others: Chaplain, retention, legal, medical

#### **Executive Officer Best Practices to make Command and Staff Meetings more Effective**

- Have a clearly defined purpose and objectives. Focus on key issues and decisions needed.
- Prepare an agenda, distribute it in advance, and stick to it.
- Send out read-ahead slides far enough in advance to allow staff members to review the material, identify minor issues, and make necessary corrections before the meeting.
- Staff and commanders should address the issues, concerns, or areas that need assistance.
- Focus on key issues, concerns, and where help is needed.
- Pin the rose on someone at the meeting for actionable items.

**Note:** Command and staff meetings should be interactive, with members encouraged to ask questions, provide feedback, and engage in discussions. Effective command and staffs result in adjustment actions, meeting command requirements, and improving shared understanding.

## Command Supply Discipline Program

In late summer of 2021, the 4-31 Infantry and elements of the 2nd Brigade Combat Team/10th Mountain Division staff returned from deployment, facing the daunting task of merging twelve distinct unit identifier codes (UICs) into the original, organic property UIC. Compounding this challenge, lateral transfers known as a proposed sourcing decision (PSD) occurred throughout the unit's deployment. The property book mergers and lack of PSD reconciliation resulted in twelve distinct Financial Liability Investigations of Property Loss (FLIPLs) and more than 40 delinquent PSDs.

Several factors contributed to the problem becoming so significant and include:

- Zero rear detachment property book holders had Global Combat Support System-Army (GCSS-A) access or experience as a supply storage location (SLOC) holder.
- Additionally, all trained supply personnel deployed forward, and no supply specialist remained with the rear-detachment. By the time a noncommissioned officer (NCO) for supply arrived at the end of the deployment, none of the original rear detachment property book holders remained.
- The unit was not actively monitoring the decision support tool and did not see several property items in "Open Vetting." Open vetting allows the unit to request adjustment of the condition code of the equipment or suspense dates of waypoints for execution.

Recognizing the significance of these issues, the battalion XO personally spot-checked layouts against component hand receipts and supervised training for key stakeholders on property management. In addition to requiring a full Change of Command out brief for closing property book mergers with the battalion commander, XO, and supply personnel, the unit was required to brief to the brigade commander and XO.

-MAJ Thomas Duncan, 4-31 Infantry

The Command Supply Discipline Program (CSDP) is a crucial aspect of unit readiness, ensuring that commanders can effectively manage and account for supplies. The program's purpose is to prevent loss, damage, or misuse of government property, and to maintain accurate and up-to-date records of supplies and equipment.<sup>33</sup> CSDP is essential for units to maintain a high level of readiness and responsiveness.

The key lesson learned from this experience is that leader presence and emphasis on CSDP can significantly impact the success of the program. The importance of the program continues prior to significant events and even during deployments. Additionally, determining who owns what portion of the CSDP "fight" at each echelon (company/battery/troop, battalion level, brigade) effectively delineates responsibility and allows for execution of the tasks within the commander's intent. By prioritizing CSDP and investing time and resources in its implementation, units can ensure that they are prepared to respond to any challenge or contingency.

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<sup>33</sup> U.S. Army Regulation 710-2, *Supply Policy Below the National Level*, 2019, page 1.

### Best Practices for Supply Discipline

**Conduct thorough inventories:** Ensure leaders have enough time. This means not only 100 percent layouts, but time for updating hand receipts and reconciling discrepancies. Must be on the calendar and protected from distractors.

**Routine training of supply personnel:** Ensure they understand Army and local guidance on supply procedures and best practices. This includes not only supply personnel, but unit leaders at all levels who have a role in accountability. Do not rely on training from previous units or primary military education to be adequate, even for personnel assigned in supply billets.

**Leadership involvement:** Spot checking inventories by Big 5 leadership to ensure standards. In/out briefs not only during change of commands but following services (with all key stakeholders), and leaders accessing key supply systems to review status of property actions.

**Special emphasis for ad-hoc units:** Whether it is a long term, such as a rear detachment, or a task reorganization that will last during specific mission (combat training center [CTC] rotation), ensure you dedicate the correct resources to account for equipment that moves with personnel. This may require specifically assigning supply personnel or dedicating more time during preparation for the transition.

Combined Arms Support Command (CASCOM) provides a useful guide for commanders about CSDP on their website, the guide provides a deeper discussion on several topics including:<sup>34</sup>

- Roles and responsibilities
- Types of property
- Accountability/inventories/change of commands
- Government purchase card
- Financial liability investigations of property loss
- Equipment on hand for USR

Additionally, CASCOM maintains several training products/tools for users:

- Links to Headquarters, Department of the Army (HQDA) G-4 property accountability, property book operations, quartermaster websites
- Training videos
- Example products
- Contacts for topics of interest

### Maintenance

Units should develop a deliberate junior leader-driven individual training approach to operator and mechanic education, with a focus on equipment knowledge and maintenance.

– BG Michael J. Simmering  
Winning the Maintenance Fight at Pace

<sup>34</sup> <https://cascom.army.mil/>.

The Battalion XO should work with the battalion maintenance officer (BMO) and other stakeholders to develop a comprehensive maintenance standard operating procedure (SOP) that outlines the maintenance program's processes and procedures. The Army Maintenance Management System (TAMMS) provides a framework for maintenance management.

The unit maintenance SOP should cover:

- Use GCSS-A for maintenance management and to track readiness
- Individual operator and mechanic training programs to obtain a government equipment operator's license and provide training on the use of technical manuals (TMs) and interactive electronic technical manuals (IETMs), safety, dispatching procedures, and recovery operations
- Preventive maintenance checks and services (PMCS)
- Quality control, dispatching standards, and spot-check Soldier performance of PMCS and Technical Manual (TM) 10-series maintenance
- Safety standards
- Test, measurement, and diagnostic equipment (TMDE) calibration
- Management of Class IX repair parts, including depot level repair parts and shop/bench stock
- Relationship and responsibilities of the FSC
- Responsibilities for operators and companies with reporting and DA Form 5988s maintenance
- Agenda and standards for maintenance meetings
- Field operations
- Format and timelines for equipment status reporting

While the maintenance SOP describes the processes that are necessary to achieve success, there are some significant differences between how actions flow based on an administrative versus a tactical environment. For example: Department of the Army (DA) Form 5988E Equipment and Maintenance worksheet flow in the administrative environment usually follows a 1-week flow model. In a tactical environment that pace is increased to every 2-3 days, with a hard copy remaining with the operator to facilitate recording of faults that are exchanged in a logistic package.

Maintenance meetings often cover the following topics (by units/system):

- Communication system status
- Vehicle status
- Dispatch status
- Milage validation
- Army Oil Analysis Program (AOAP) status
- Overage reparable/recoverable report
- TMDE status
- DA Form 5988E maintenance status
- Weapons status
- Service status and schedule
- Modified workorder status and schedule
- Review and scrub equipment status report (ESR)

Center for Army Lessons Learned (CALL) Handbook 23-08, *Leader's Guide to Maintenance and Services*, provides a deep dive into all these topics and others. It also provides an example maintenance SOP from an armored brigade combat team (ABCT) as a starting point for developing your own unit SOP.

**Specific Activities the Battalion Executive Officer should Oversee to Ensure an Effective Maintenance Program**

- Have a well-stocked publications library with sufficient TMs and IETMs to support operators and mechanics.
- Conduct regular inspections of maintenance activities to ensure that units are adhering to the maintenance SOP. This includes inspecting unit motor pools, maintenance facilities, and equipment to identify any maintenance issues or deficiencies.
- Review and analyze maintenance metrics, such as equipment readiness rates, maintenance backlogs, and parts availability, to identify trends and areas for improvement.
- Ensure that units are properly using maintenance management systems, such as GCSS-A, to manage equipment maintenance and track readiness. This includes ensuring that units accurately report equipment status, schedule maintenance, and track parts and supplies.
- Conduct regular maintenance meetings with unit leaders and maintenance personnel to discuss maintenance issues, review maintenance metrics (reviewing equipment readiness rates, maintenance backlogs, and parts availability), and prioritize maintenance efforts.
- Ensure that units have the necessary resources, including personnel, equipment, and funding, to perform maintenance tasks.
- Foster a culture of maintenance excellence within the battalion by emphasizing the importance of maintenance and recognizing units and individuals who demonstrate exceptional maintenance performance.
- When necessary, develop and implement a maintenance improvement plan with steps to address maintenance issues and improve performance.
- Ensure that units are complying with maintenance regulations and policies, including Army Regulation (AR) 750-1, *Army Materiel Maintenance Policy*, 2 February 2023 and Department of the Army Pamphlet (DA PAM) 750-8, *The Army Maintenance Management System*, 22 August 2005.

### Unit Status Reporting

The U.S. Army relies on the commander's USR to monitor and report unit readiness. Units submit their USRs, typically on a monthly or quarterly basis, depending on their deployment status and operational tempo. This standardized framework enables senior Army commanders to make informed decisions about resource allocation and deployment.

To submit their USRs, battalion-level commanders or their representatives use the Defense Readiness Reporting System-Army (DRRS-A). They complete assessments and provide explanations for their unit's status and then submit their reports through the DRRS-A portal. For classified reports, they use the net-centric USR system. Units typically draft their report comments on unclassified systems, but once they enter their final assessments, the report becomes classified as SECRET for most units.

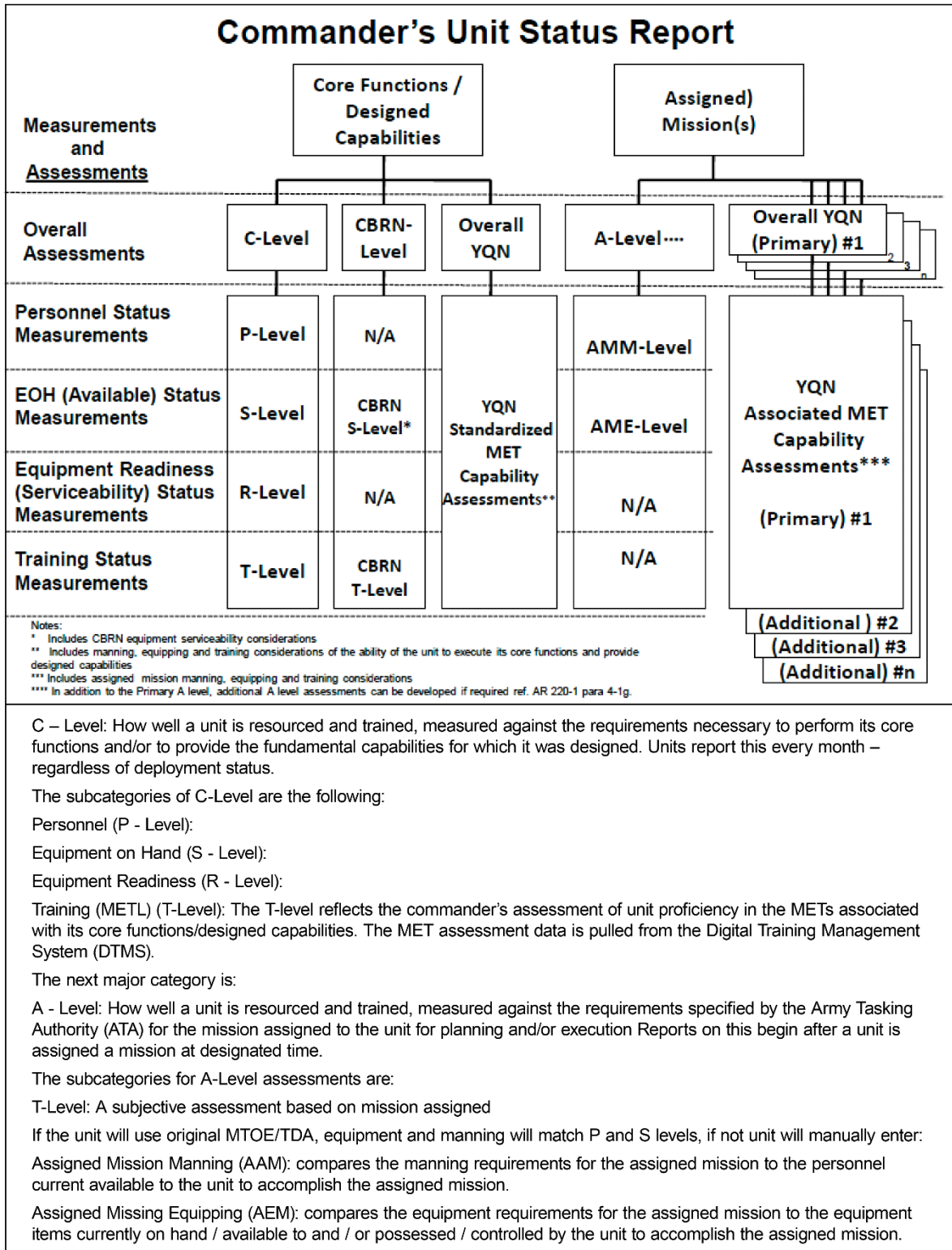


The U.S. Army provides comprehensive training and resources to support the USR process. The DRRS-A portal (<https://drrsa.aoc.army.pentagon.mil/protected/main.html>) offers a range of resources to help users understand USR requirements, including:

- Field Manuals (FMs) and policies that govern USR reporting
- Guides for new officers, which provide access assistance and support for navigating the DRRS-A system
- Calendars for scheduling web-based training sessions
- Online training registration tools to facilitate user enrollment
- Overview briefs that outline each step of the USR process for different unit types

Additionally, Army Regulation (AR) 220-1, *Army Units Status Reporting and Force Registration*, 16 August 2022 and the Commander's Procedure Manual provide detailed step-by-step instructions for completing USR assessments. These resources ensure that all users understand the procedures for handling sensitive information and submitting classified reports through net-centric USR.

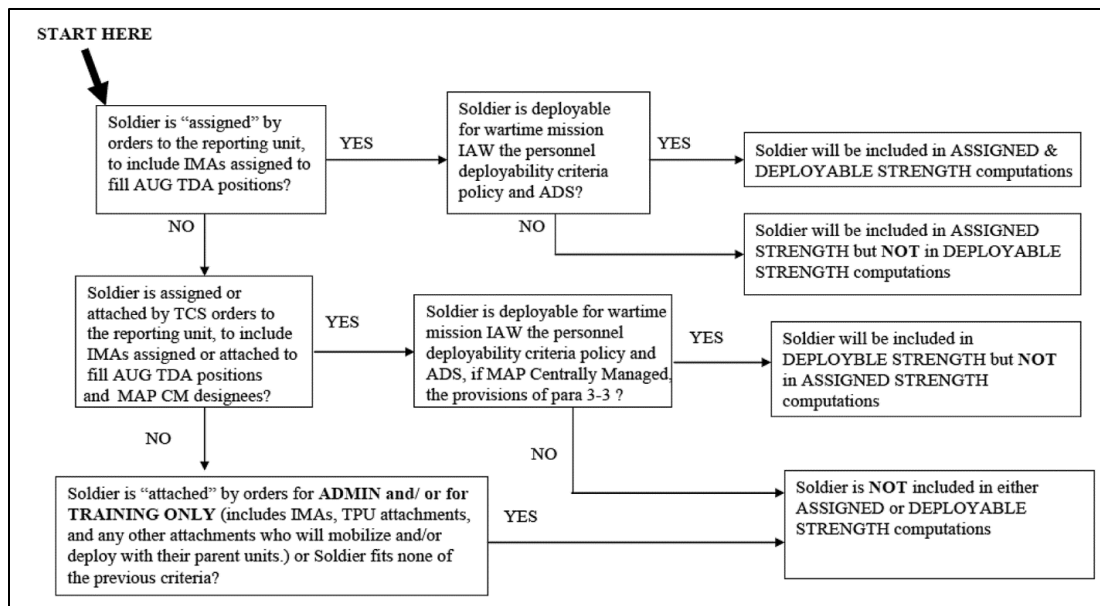
The USR process culminates in a comprehensive unit readiness picture, which informs senior leaders about personnel strength, equipment readiness, and training proficiency. The type of unit and its current mission determine the type of report and frequency of reporting. Figure 7-1 illustrates how unit assessments come together to provide senior leaders with a clear understanding of unit readiness. By standardizing unit readiness reporting, the USR framework enables the U.S. Army to make informed decisions and optimize resource allocation.



**Figure 7-1. Unit Assessments provide Understanding of Readiness<sup>35</sup>**

<sup>35</sup> <https://drrsa.aoc.army.pentagon.mil/protected/docs/unit-readiness/CUSR-PPM2-10MAR23.pdf>.

Units report on their authorized and actual strength, as well as any personnel shortages or gaps. They report on the readiness of their equipment, including vehicles, weapons, and communication systems. Additionally, units must report on their training status, including the completion of individual and collective training tasks. Figure 7-2 shows how to reach personnel ratings in a flowchart.



**Figure 7-2. Flowchart for Reporting the Assigned and Deployable Strength<sup>36</sup>**

Reporting personnel determine a Soldier's status using the flowchart to assess whether the Soldier is assigned and deployable. To make these personnel assessments, reporting officers must also consider additional factors, including whether the assigned person possesses the correct military occupational specialty (MOS) skill match. Reports then compare this number to the personnel authorized in the unit's modified table of organization and equipment (MTOE) or table of distribution and allowances (TDA). Together you get percentages by grade and skills that determine the unit's personnel ratings (P-level).

The equipment on hand (S - Level) and equipment readiness (R - Level) are both pulled directly from GCSS-A. The Training (mission essential task list [METL]) (T-Level) is pulled from the Digital Training Management System (DTMS).<sup>37</sup> Commanders can include data about those assessments when compiling the final report.

<sup>36</sup> Ibid.

<sup>37</sup><https://federation.eams.army.mil/pool/sso/authenticate/l/15?f=c&m=GET&p=8907&r=f&u=https%3A%2F%2Fdtms.army.mil%2F&x=true>.

When initiating the report at the beginning of the month, net-centric USR receives a snapshot from other Army databases, including the Integrated Total Army Personnel Database (ITAP)<sup>38</sup> and the Medical Protection System (MEDPROS).<sup>39</sup> If the commander identifies a discrepancy in the automated report regarding personnel status, they must manually resolve the issue. Also note that the net-centric USR does not update the other databases. So, S-1 or medical personnel must manually correct the discrepancies in the originating systems, such as ITAP or MEDPROS.

### Best Practices for USR

Avoid assigning the task of filling out the USR to the least knowledgeable officer, such as a 2LT, without providing proper guidance, training, and oversight. This leads to inaccurate reporting or unnecessary supervisory burdens on the XO. USR is a total staff effort to provide inputs to comments justifying ratings.

Leverage your garrison battle rhythm as a starting point to streamline the USR process. Effective Command and Staff meetings, Maintenance meetings, and timely entry of training results into the DTMS can save significant time and effort when reconciling the USR.

The USR serves as a snapshot for higher echelons but also provides an assessment to the commander on their programs. One aspect of USR is equipment readiness, with GCSS-A generating operational readiness (OR) rates for your major systems. A unit that quickly repairs deadline faults demonstrates a strong emphasis on maintaining combat power and adhering to good maintenance procedures.

**Note:** From CTC trends: Units with low home station OR rates often struggle to generate combat power during operations.

## S-3 Areas of Emphasis

The operations cell is responsible for managing various aspects of the unit's operations in garrison to include training lands, ammunition, taskings, and resource management. Effective management of these areas is essential to ensure the unit's readiness, effectiveness, and safety.

### Training Management

The operations cell is responsible for managing the unit's training program, including developing and implementing training plans, coordinating with outside agencies, and ensuring resources are aligned to training.

One of the key products that assists with training management is maintaining the training calendar. It accounts for major unit actions and should support the execution of your annual and/or quarterly training guidance.

<sup>38</sup> <https://www.hrcapps.army.mil/iws/?page=shared.person.soldier.tapdb>.

<sup>39</sup> <https://medpros.mods.army.mil/MEDPROSNew/>.

Some of the key tasks involved in training management include:

- Entering information into the Army Training Network
- Monitoring and evaluating readiness
- Accounting for steps of the 8-step training model in training development
- Managing resources and coordinating between units
- Coordinating with other units and external agencies to support activities
- Providing updates and status reports to higher headquarters and external agencies as needed
- Movements and deployments

## Land Management

### Vignette

#### Know your Training Environment

Land and time represent the two most valuable resources to military training. Often there are adjacent training venues that can achieve your objectives. Ensure you understand your home station training environment to maximize training opportunities.

During my time at Fort Bragg, I was unaware of the proximity and capabilities of Fort A. P. Hill. This is a facility that could have readily supported platoon and company-level training with its unique features, such as a subway system, multi-story buildings, and ample maneuver land. Our failure to utilize this resource represented a missed opportunity to optimize training and expose our Soldiers to complex operational environments.

We implemented a standard requiring all incoming members of Big 5 and company command teams to conduct a comprehensive reconnaissance of local training areas. Led by our master gunner, this reconnaissance augmented standard garrison range briefings, focusing on the specific challenges and opportunities presented by various training complexes. We emphasized identifying hidden opportunities and assessing the resource costs associated with each site selection.

-CSM (R) Ron Pruyt

The S-3 is responsible for managing the unit's training, including ranges, training areas, and other facilities. This involves coordinating with other units, higher headquarters, and external agencies to ensure the training areas are available and suitable for training. The S-3 must also ensure that all necessary permits and approvals are obtained and that environmental and safety regulations are complied with. Some of the key tasks involved in land management include:

- Coordinating with brigade or division to schedule training events
- Conducting reconnaissance of training areas to understand resource requirements
- Obtaining necessary permits and approvals for training events
- Ensuring compliance with range control and safety regulations
- Managing the unit's land use plan to ensure effective distribution

## Ammunition Management

The S-3 is responsible for managing the unit's ammunition, including ordering, storing, and issuing ammunition to units. This involves coordinating with the unit's S-4 support company, as well as with higher headquarters and external agencies.

Due to the regulations about issuing and storing ammunition, it must be coordinated well in advance to ensure safety and accountability standards are followed. Some of the key tasks involved in ammunition management include:

- Coordinating with the logistics section to order, issue ammunition and recover dunnage and excess
- Managing the unit's ammunition inventory to ensure that it is accurate and up to date to efficiently use all ammunition by close of the fiscal year and support training
- Ensuring that ammunition is stored and handled safely and in accordance with regulations
- Coordinating with range control to understand ammunition limitations within training areas
- Managing your annual account
- Knowing when to order ammo/ship ammunition

## Taskings Management

The S-3 is responsible for managing the unit's taskings, including coordinating with higher headquarters and external agencies to receive and prioritize taskings. This involves analyzing the unit's capabilities and resources to determine the best way to accomplish each task.

Use of a daily fragmentary order and task tracker are the most common ways units manage taskings. Highlight and assessments of these products are briefed during the weekly battalion training meeting. Effective task management includes:

- Issuing daily orders and orders for special events
- Coordinating with higher headquarters to receive and prioritize taskings
- Analyzing the unit's capabilities and resources to determine the best way to accomplish each tasking and is often completed through a troop-to-task document
- Developing and implementing plans to accomplish taskings
- Coordinating with other units and external agencies as needed to accomplish taskings
- Providing updates and status reports to higher headquarters and external agencies as needed

## Resource Management

### Best Practices for Understanding your Training Environment

- Conduct a reconnaissance of your training support center (TSC)
- Conduct a tour/ reconnaissance of range control
- Sit down with your brigade land/ammunition team
- Understand the division land ammunition reservation processes and suspense times
- Recon ammunition holding area (AHA)/ammunition supply point (ASP) and understand garrison SOP and storage capacity

The S-3 is responsible for managing the unit's resources, including personnel, equipment, and facilities. This involves coordinating with other units, higher headquarters, and external agencies to ensure that resources are allocated efficiently and effectively.

These tasks may be accomplished with garrison organizations or higher HQs. Like land resources, many installations have considerable competition for resources, so early coordination is essential. While some resources are physical such as training devices or buildings, others include personnel slots at schools or training. Key tasks in resource management include:

- Coordinating with the unit's logistics section to distribute ammunition and supplies
- Coordinating with facilities management to ensure that facilities are received and returned in acceptable condition
- Developing and implementing plans to allocate resources between subordinates



- Ensuring school slots are allocated within commander's guidance and personnel are ready to attend, this may include back-up slots
- Providing updates and status reports to higher headquarters and external agencies

In summary, the operations cell plays a critical role in managing the unit's land, ammunition, taskings, and resources. Effective management of these areas is essential to ensure the unit's readiness. The operations cell coordinates with other units, higher headquarters, and external agencies to ensure the units can execute missions and achieve training objectives. See CALL's *Home Station Training Handbook* for a deeper understanding on training management best practices.

## **Appendix A**

### **Standard Operating Procedures**

This appendix provides specific guidance on maintaining effective standard operating procedures (SOPs) for your unit. A well-crafted SOP outlines responsibilities, procedures, and expectations for unit personnel during operations. At the battalion level, a robust SOP is crucial for success in training, daily operations, and combat.

There are several types of SOPs that a unit can develop, however these are the most common:

- Tactical SOP (TACSOP): Standards for Soldiers and unit activities including reporting
- Tactical operations center (TOCSOP): Standards for operations of a command post (all configurations) including security requirements
- Plans standard operating procedure (PSOP): Standards for planning usually found at echelons above brigade (this information is included in the TOCSOP at most battalions)
- Knowledge management SOP (KMSOP): Standards for sharing and storing information on digital systems within a unit (often within the TOCSOP at most battalions)

No single SOP example can meet the diverse needs of all units. XOs/S-3s must regularly update their SOPs to account for changes in the operating environment and other requirements. Each commander's needs differ, and what works for one commander does not meet the needs of his successor. Logistics reporting formats vary significantly between garrison and deployed environments and may change if assigned to a new headquarters. Your SOP may require updates due to fielding new equipment and cause you to refine TTPs for operational employment of your forces, and task organization changes.

#### **Define Duties and Responsibilities:**

- Define how you will conduct current operations and planning.
- Provide all battle drill procedures, including individual section responsibilities, from initiation to close-out.
- Include tracking tools for when executing multiple battle drills or battle drills that may take several shifts/days to complete.
- Clearly define products for tracking significant activities, running estimates and situational updates.
- Ensure continuity between analogue and digital forms of tracking and assign responsibilities for updating both.
- Include authorities for decisions in environments where not all leaders are accessible.
- Include knowledge management processes, product standards and responsibilities for maintaining shared understanding between other sections.
- Include network and radio operation procedures, reporting requirements, and trouble-shooting procedures.
- Define responsibilities between various command post (CPs) when operating in different configurations (such as when the TAC is operating concurrently with the main CP).
- Provide a clear checklist for transition of authorities between CPs during transitions (see Table A-1).

One of the keys to a successful SOP is developing a clear checklist that supports your unit's vision for how to conduct routine activities. These provide guidance to both old and new staff on what the standards are for your unit, as well as providing an easy-to-follow standard when executing transitions in less-than-ideal conditions or under duress. Table A-1 provides a basic

checklist for how to transition command and control (C2) from one CP to another while still maintaining situational understanding.

**Table A-1. Example of a Command Post Transition Checklist<sup>40</sup>**

Task	Responsible	Time
Pre-Transition		
Notify supporting and adjacent units	S-3	24-48 hours prior
Develop transition timeline	XO	24-48 hours prior
Conduct reconnaissance of new CP location	S-2 / S-3 / S-6	24-48 hours prior
Update maps and graphics	S-2 / S-3	24-48 hours prior
Coordinate logistics and supply	S-4	24-48 hours prior
Notify key personnel	BN CDR / S-3	24-48 hours prior
Prepare to Deploy CP node		
Pack and prepare equipment	Staff personnel	4-6 hours prior
Conduct final movement checks	Staff personnel	4-6 hours prior
Establish communication protocols	S-6	4-6 hours prior
Coordinate security	S-3	4-6 hours prior
Transition Responsibilities		
Begin transition	BN CDR / XO	On Order
Transfer equipment and supplies	Unit personnel	Transition execution
Establish and Secure the new CP location	S-2	Transition execution
Establish communication systems	S-6	Transition execution
Conduct turnover by WFF of current situational understanding, running estimates, SIGACTs	All staff sections	Transition execution
Post Transition		
Assume C2 responsibilities at new CP	All staff sections	Post-transition
Notify supporting and adjacent units	S-3	Post-transition
Update records and documents	S-1	Post-transition
Conduct debrief	BN CDR / XO	Post-transition

<sup>40</sup> Author generated.

**Define How You will Conduct Planning:**

- Provide examples of MDMP products, running estimates, orders, annexes, and tools for controlling and executing operations.
- Provide a detailed checklist to transition plans to current operations for execution.
- Clearly define responsibilities for executing the steps of military decision-making process (MDMP) or Army design methodology (ADM).
- Assign responsibility for briefing during MDMP, rehearsals, and issuing orders.
- Define responsibilities when conducting rapid decision-making and synchronization process.
- Naming convention standards at echelon for graphics and control measures.

**Standards for Routine Activities**

Define your responsibilities and subordinates when conducting the following: reconnaissance and security planning, targeting, transfers of responsibilities between units, casualty evacuation (CASEVAC), logistical support to include reporting, logistics packages (LOGPACs), and recovery.

- Provide standards for common marking of vehicles, units, and operations.
- Provide reporting examples for submission to higher HQs and reporting from subordinate units.
- Establish common standards for graphics at echelon to facilitate activities such as LOGPAC, CASEVAC, passage of lines, and clearance of fires.
- Provide common standards for uniform, personal and vehicle load configurations.

**Guidance for Staff Administration:**

- Load plans for movement and responsibilities for staff when displacing in all potential configurations.
- Diagrams of CP configuration including responsibilities for set up and break down.
- Security considerations and responsibilities in various threat environments.
- Explanation of logistics and supply procedures for the staff.
- Maintenance and repair responsibilities for major end items, shared equipment, and communications systems.
- Procedures for routine medical support as well as medical evacuation of staff personnel.
- Health service support, rest plan management, sanitation requirements, and standards for workspace and common areas.

**Best Practices for SOPs:**

- Assign a senior staff member to oversee SOP updates and maintenance, ensuring that your unit's SOP remains current and accurate.
- Engage key stakeholders in the update process to ensure their buy-in and input, which will help to ensure the SOP's accuracy and effectiveness.
- Develop standard product examples that new team members can quickly access to understand expectations, reducing the need for extensive training.
- Incorporate visual aids, such as diagrams, flowcharts, and screenshots, to help illustrate complex procedures and concepts, making the SOP more accessible and user-friendly.
- Consider your SOP must work in a variety of environments. Determine what information is best accessible digitally versus what must be available in hard copy in your CP to allow you to function in degraded environments with limited electronics.
- Regularly review and update your SOP to ensure that staff processes are current, and reference materials are accurate. During AARs of staff planning, training, and mission execution, identify recommended updates for the SOP.

The Center for Army Lessons Learned (CALL) published *Relevant, Readable, and Accessible SOPs: A Guide to Updating Battalion TACSOPs*<sup>41</sup> with an in-depth discussion on guiding principles when considering SOP development.

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<sup>41</sup> Levy, Nathan, *Relevant, Readable, and Accessible SOPs: A Guide to Updating Battalion TACSOPs*, Center for Army Lessons Learned (CALL) May 2021.

## **Appendix B**

### **Getting the Commander's Guidance**

#### **Capturing Commander's Guidance During MDMP**

To enhance the military decision-making process (MDMP), implement a "Commander's Guidance Worksheet" – a standardized format to record and track guidance throughout the process. This tool ensures all staff members maintain a shared understanding of the commander's intent.

#### **Key Stages for Capturing Guidance:**

- **Upon receipt of mission (ROM):**
  - Record the commander's initial intent in their own words.
  - Identify key questions the staff must answer during mission analysis.
  - Note any specific instructions or priorities
- **At the end of mission analysis (MA):**
  - Confirm the mission statement.
  - Receive the commander's refined intent based on the staff's analysis.
  - Capture specific planning guidance, including constraints, the desired end state, and acceptable risk.
- **During course of action (COA) development:**
  - Record the commander's assessment of each COA's alignment with their guidance (provided during the COA development brief).
  - Note any modifications or additional guidance arising during COA comparison and analysis.

Displaying the commander's guidance in a structured format, like Figure B-1, enables the staff to quickly assess if their efforts align with the commander's intent. This minimizes misinterpretations and keeps planning efforts focused on achieving the desired outcomes.



<p align="center"><b>Commander's initial Guidance Worksheet</b></p> <p align="center">MDMP Step 1 – Receipt of Mission</p> <p align="center">Purpose: To focus staff for Step 2 – Mission Analysis</p>	
<p>DTG: <i>01 1300 July 25</i></p>	
<p>Planning Methodology:</p> <p><input type="checkbox"/> ADM</p> <p><input type="checkbox"/> ADM + MDMP (sequential)</p> <p><input type="checkbox"/> ADM + MDMP (simultaneous)</p> <p><input type="checkbox"/> MDMP</p> <p><input checked="" type="checkbox"/> Abbreviated MDMP:</p> <p><input type="checkbox"/> RDSP</p> <ul style="list-style-type: none"> <li><i>Execute a directed COA:</i></li> <li><i>A Co with additional tank platoon as ME to seize OBJ STEEL;</i></li> <li><i>1x Tank PLT as BN Reserve</i></li> </ul>	<p>Plan / Order / OPN Name:</p> <p><i>- Lion Hunt</i></p>
<p>Timeline:</p> <p>OPORD Issued: <i>02 1800 Jul</i></p> <p>Rehearsals: <i>02 2200 Jul</i></p>	<p>Type of OPORD:</p> <p><input checked="" type="checkbox"/> Full 5 paragraph</p> <p><input type="checkbox"/> Matrix Style</p> <p><input type="checkbox"/> FRAGORD</p>
<p>LNO Requirements</p> <p>LNOs out to: <i>1x CPT to Brigade Ops</i></p> <p>LNOs in from: <i>1x SSG from MP CO</i></p>	<p>Movement / Recon to Initiate</p> <p><i>SCT LD NLT 02 1900</i></p>
<p>Draft BN Fight:</p> <ul style="list-style-type: none"> <li><i>Recon of ME axis of attack</i></li> <li><i>FPOL with 1<sup>st</sup> BN</i></li> <li><i>Isolate OBJ STEEL</i></li> </ul>	<p>Non-SOP Fighting Products:</p> <p><i>1x SSG from MP CO</i></p>
<p>Initial Information Requirements:</p> <ul style="list-style-type: none"> <li><i>RTEs along ME axis of attack</i></li> <li><i>Location and composition of EN obstacles</i></li> <li><i>Location of primary battle positions</i></li> <li><i>Location and routes for EN reserve</i></li> <li><i>Combat power of A CO (ME) and reserve</i></li> <li><i>Status of Air Weapons Team (2x AH-64) supporting ATK</i></li> </ul>	
<p align="center">Page <u>1</u> of <u>2</u></p>	

**Figure B-1a. Example Commander's Guidance Worksheet for Receipt of Mission**

Purpose: To focus staff for Step 2 – Mission Analysis
<b>Movement and Maneuver</b> <ul style="list-style-type: none"> <li>• <i>Time/Distance for movement to SBF &amp; ATK Position, and timing to OBJ STEEL</i></li> <li>• <i>Estimate and movement control plan for FPOL</i></li> <li>• <i>Location and positioning of BN Reserve</i></li> <li>• <i>Prioritize mobility support to B Co and A Co</i></li> </ul>
<b>Intelligence / Recon</b> <ul style="list-style-type: none"> <li>• <i>Primary and alternate coverage for NAIs (RTE, OBJ STEEL, to EN Reserve)</i></li> <li>• <i>Where are enemy EAs, BPs, and alt/hide positions</i></li> <li>• <i>Status of any key terrain or choke points along axis of attack</i></li> </ul>
<b>Fires (lethal)</b> <ul style="list-style-type: none"> <li>• <i>Location and timing for displacement of BN Mortars</i></li> <li>• <i>Air corridors for AWT to support attack</i></li> <li>• <i>Plan to neutralize enemy c-fire</i></li> </ul>
<b>Fires (non-lethal / IO):</b> <ul style="list-style-type: none"> <li>• <i>Messaging to civilians along route and OBJ STEEL</i></li> <li>• <i>Isolate enemy communication on OBJ STEEL through EW</i></li> </ul>
<b>Protection:</b> <ul style="list-style-type: none"> <li>• <i>Mitigation of enemy UAS along axis of attack and at OBJ STEEL</i></li> <li>• <i>Plan for employment of Volcano to isolate OBJ STEEL following seizure</i></li> </ul>
<b>Sustainment:</b> <ul style="list-style-type: none"> <li>• <i>Look at CASEVAC along route and after seizure (forward locate Aide)</i></li> <li>• <i>Capabilities to transport EPW off OBJ within 4 hours</i></li> <li>• <i>Push package of CLS 3/5 following seizure of OBJ STEEL</i></li> </ul>
<b>Command and Control:</b> <ul style="list-style-type: none"> <li>• <i>Verify LOS and C2 analysis along route and back to Brigade</i></li> <li>• <i>EMCON widows to prevent En EMS from identifying</i></li> <li>• <i>Define TAC fight: include coordinate SBF and AWT support to attack</i></li> </ul>
<b>Other:</b> <ul style="list-style-type: none"> <li>• <i>Linkage between attack on OBJ STEEL, with 3<sup>rd</sup> BN attack on OBJ IRON</i></li> </ul>
Page <u>2</u> of <u>2</u>

**Figure B-1b. Example Commander's Guidance Worksheet for Receipt of Mission (continued)**

### **Legend**

ATK	attack
BN	battalion
CASEVAC	casualty evacuation
CO	company
FRAGORD	fragmentary order
LD	line of departure
LNO	liaison
MDMP	military decision-making process
MP	military police
NLT	not later than
OBJ	objective
OPORD	operations order
RECON	reconnaissance
RTE	route
SSG	staff sergeant

### **\*Source**

Example Commander's Guidance Worksheet for Receipt of Mission:

[https://armyeitaas.sharepoint-mil.us/:b:/r/teams/BC2HelpfulProducts/Shared%20Documents/General/WFF%20Fighting%20Products/00.%20CDR%20Written%20Guidance/CDR%20Guidance%20Examples\\_Combined.pdf?csf=1&web=1&e=8aARmz](https://armyeitaas.sharepoint-mil.us/:b:/r/teams/BC2HelpfulProducts/Shared%20Documents/General/WFF%20Fighting%20Products/00.%20CDR%20Written%20Guidance/CDR%20Guidance%20Examples_Combined.pdf?csf=1&web=1&e=8aARmz), Joint Readiness Training Center Brigade Combat Team Toolkit, accessed 1 August 2025 (CAC enabled).

## Appendix C

### Garrison Battle Drills

By adopting the principles used in deployments, units can ensure reporting in garrison is effective at supporting the command. This includes:

- Coordinating with various staff sections to complete all necessary actions
- Gathering timely and accurate information to support reporting
- Increased consistency and standardization in the process to reduce stress and confusion among staff and subordinates
- Defining specific roles and responsibilities for each stakeholder
- Ensuring that all required follow-up actions, including logging incidents and updating records
- Establishing a clear timeline for completion of each action
- Providing regular updates and progress reports to the commander and other stakeholders
- Continuously reviewing and refining reporting to ensure effectiveness and completeness

**Note:** Ensure your battle drills support requirements for reporting to the brigade or division.

Some common garrison battle drills may include Death of a Soldier/family member, suicide, or missing Soldiers.

**Table C-1. Death of a Soldier Battle Drill<sup>42</sup>**

BN Battle Drill: Casualty Ops						
Status: Red= Not Started   Amber= In Progress   Green= Complete   Black= N/A						
Phase 1: Casualty Assistance/AAR/Investigation						
Line	Person Responsible	Action	Reported To	Method Used	NLT Time	Status
1	First Responder	Contact Soldier's CDR/1SG, if known, Staff Duty, and Humphreys PMO (if applicable).	Immediate Chain of Command	Phone	C	
2	Co CDR/1SG/ SDO receiving notification	Notify Chain of Command to include BC, BN CSM, 19th ESC, and BN Chaplain. Further key leader notification at BC's discretion.	BN and 19th ESC CMD Team	Phone	C+ Immediate	
3	BC	Notify MSC-K and 19th ESC of SIR.	19th ESC CG and MSCK	Phone	C+ Immediate	
4	Co CDR	Identify the Body	BN XO	In Person	C + 2 hours	
5	Co CDR	Complete initial SIR/Connect-the-Dots. Send through BN XO to 19th ESC. Continue to update.	BN/19th ESC DCO	Email	C + Immediate	
6	BN S1	Pull DD93/SGLI from eMILPO or iPERMS. Deliver copies to Chain of Command. Determine PNOK location. NOTE: Confirm CAC has notified family prior to phone/email contact.	Immediate Chain of Command	Phone/Email	C+Immediate	
7	BN S-1	Notify Casualty Assistance Center and report to CAC for briefing. Provide CAC with SIR, SGLI, DD93, ORB/ERB of deceased Soldier.	CAC	Phone/In person	C+2 hours	
8	PAO/Unit CDR	Initiates Media Blackout	Immediate Chain of Command	Phone/Email	C+4 Hours	
9	BN S1	Transmit copies of Soldier records to CAC & CoC.	Immediate Chain of Command	Phone/Email	C+5 hours	
10	BN S1	Determine PNOK Location.	Immediate Chain of Command	Phone/Email	C+5 Hours	
11	BN S1	Standby for CAC notification to family.	Immediate Chain of Command	Phone/Email	C+5 Hours	
12	Co CDR/1SG	Assign CAO (If Local)	CAC/BN XO	Phone/In person	C+8 hours	

BN	battalion	CMD	command	PAO	public affairs office(r)
CDR	commander	CO	company	SDO	staff duty officer
XO	executive officer				

<sup>42</sup> Perez, Joe MAJ, Center for Army Lessons Learned

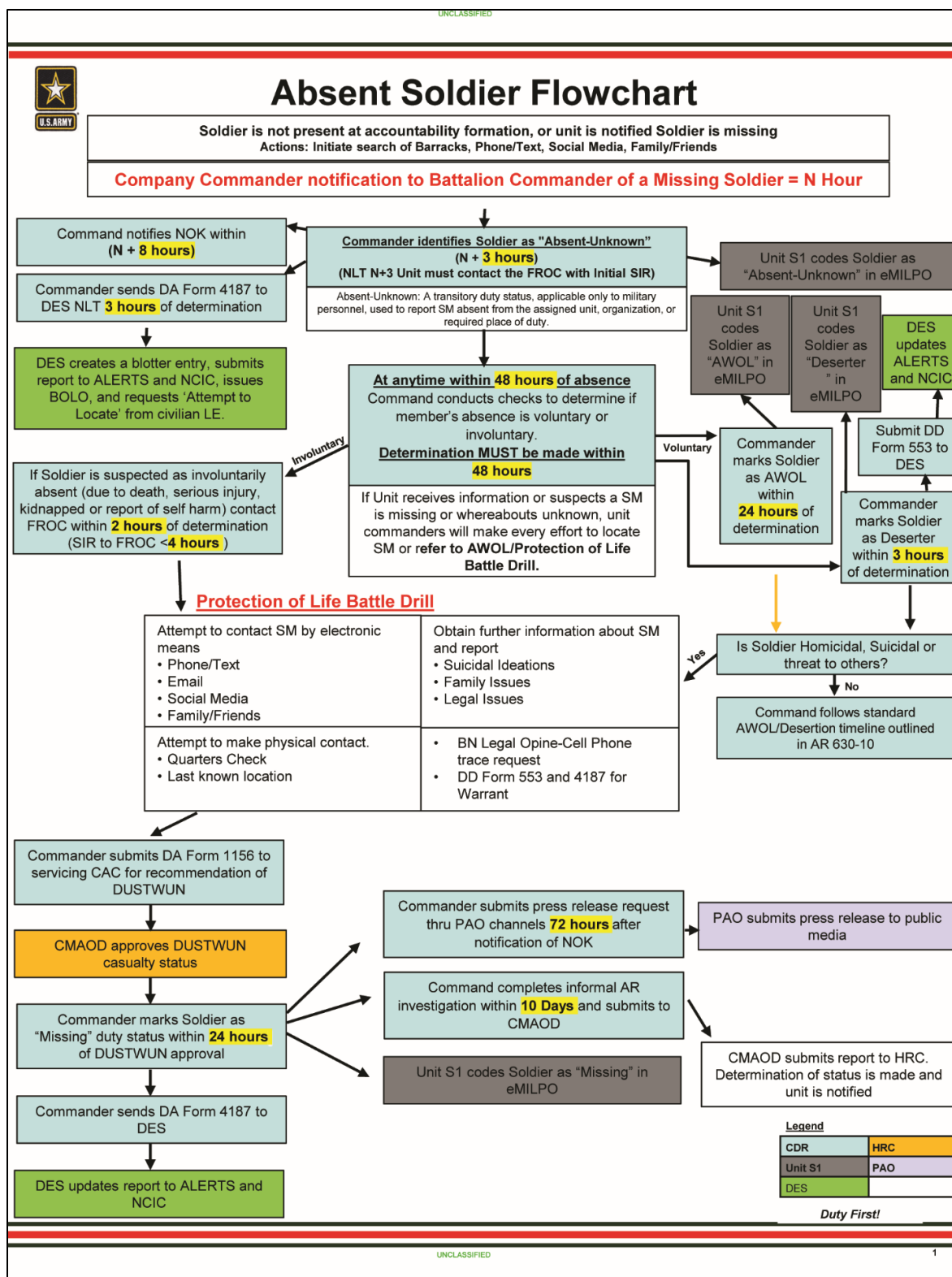


Figure C-1. Absent Soldier Flowchart<sup>43</sup>

<sup>43</sup> Perez, Joe MAJ, Center for Army Lessons Learned

## Appendix D

### XO/S-3 First 100days Checklist

The following checklist provides a recommended list of activities a newly appointed XO or S-3 should attempt to accomplish in their first 30 days.

Who	What	When
Both	Review long range and short-range calendar	Review earliest
Both	Review all battalion standard operating procedures (SOPs) (knowledge management SOP [KMSOP], plans SOP [PSOP], tactical SOP [TACSOP], tactical operations center [TOCSOP], SFRG Soldier and Family Readiness Group [SFRG], etc.)	Review earliest
Both	TOC/CP manning, maintenance, communications, and layout	Review earliest
Both	1 and 2 higher quarterly/annual training guidance	Review earliest
Both	Army Service Component Command (ASCC) and corps training guidance	Review earliest
Executive officer (XO)	Access commander's action common operational picture (COP) and review Department of the Army (DA) 4833 Status	Review earliest
XO	Officer Slate – 6 month manning projections	Review earliest
XO	Staff manning	Review earliest
S-3	Land and ammo reservations	Review earliest
S-3	Digital Training Management System (DTMS) status	Review earliest
Both	Review latest command and staff	Review prior
S-3	Review last training meeting	Review prior
Both	Attend training resource meeting	Review prior
S-3	Review crew manning	1ST Available
XO	Review unit status report (USR) with S-1, S-3, S-4, battalion maintenance officer (BMO)	1ST Available
XO	Attend maintenance meeting	1ST Available
XO	Attend service in brief	1ST Available
XO	Attend monthly 10 percent inventory	1ST Available
XO	Attend arms room inventory	1ST Available
XO	Receive update on all outstanding financial liability investigation of property loss (FLIPL) and focus on >45 Days	1ST Available
S-3	Review mission essential tasks evaluations in coordination with USR	1ST Available
XO	Staff Duty SOPs, staff duty officer/noncommissioned officer (SDO/SDNCO) rosters	1ST Available
Both	Review last staff after action reviews (AARs)	1st 14 days
Both	Review cataloging distribution data processing (CDDP) program, unit maintenance officer (UMO) and hazardous material (HAZAMT) certifications, unit deadline list (UDL) status	1st 14 days



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Who	What	When
XO	Receive staff in-briefs and running estimates	1st 14 days
XO	Review property book statuses, monthly and cyclic Inventories with S-4 and XOs	1st 14 days
XO	Review Recoverable >15 days	1st 14 days
XO	Review – Recoverable, Battery Maintenance, AOAP	1st 14 days
XO	Battalion commander evaluations	1st 14 days
XO	Ancillary maintenance status	1st 14 days
XO	Shop stock and Z-Lines	1st 14 days
XO	Z-Park and maintenance budget	1st 14 days
XO	Government purchase card (GPC) status, SOP, and budget	1st 14 days
XO	Wide open equipment status report (ESR) and deadlines >15 Days	1st 14 days
XO	Meet with S-8 and S-4 for budget review	1st 14 days
XO	Review medical evacuation boards with physician's assistant	1st 14 days
XO	Review High Risk / At Risk Soldiers with behavioral health (BH), PA, and legal	1st 14 days
XO	Legal Actions – Chapters, FG ART 15, and general officer memorandum of reprimand (GOMARs), focus on >30 Days	1st 14 days
XO	Get access to Integrated Personnel and Pay System-Army (IPPS-A), Global Command and Control System-Army (GCSS-A), Defense Travel System (DTS), government travel charge card (GTCC), and Evaluation Entry System (EES) (commander's delegate)	1st 14 days
S-3	Receive Company in-briefs and training updates	1st 14 days
S-3	Review Standards in Training Commission (STRAC) allocation, Total Ammunition Management Information System (TAMIS) reservations and land/ammo reservations	1st 14 days
S-3	Red Cycle / Post Support Tasks, battlefield mission management (BMM)	1st 14 days
S-3	Company Troops to Task	1st 14 days
S-3	Get access to TAMIS, DTS, DTMS, GTCC	1st 14 days
S-3	Review of troop schools' availability, needs to support next 6-9mo of operations	1st 14 days
S-3	DTS status, ongoing and upcoming travel	1st 14 days
Both	Counseling all rated officer/NCO	1ST 30 days
Both	Counseling senior rated officer/NCO	1ST 30 days
Both	SFRG SOP	1ST 30 days
XO	SFRG/command family readiness representative /CFRR status, funds, legal requirements	1ST 30 days
XO	Real property maintenance	1ST 30 days
S-3	Range officer in charge (OIC) certifications and certification program	1ST 30 days

## Appendix E


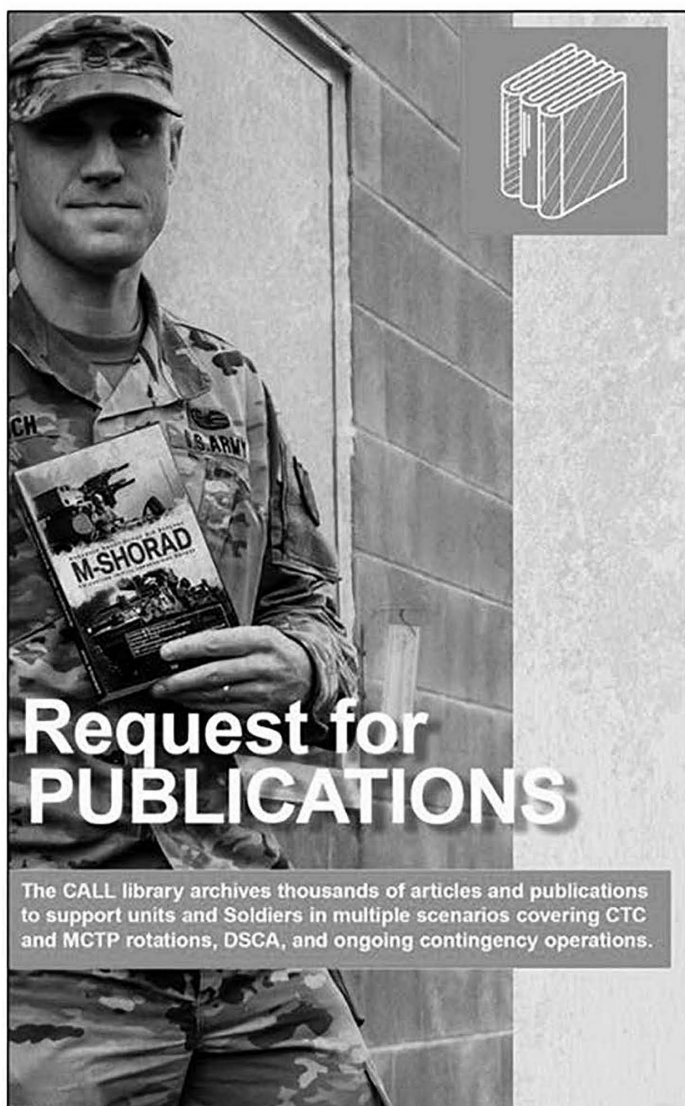
### Glossary

AATF	air assault task force
ABCT	armored brigade combat team
ADA	air defense artillery
ADM	Army design methodology
AHA	ammunition holding area
AI	artificial intelligence
AOAP	Army Oil Analysis Program
AR	Army regulation
ARSTRUC	Army structure
ASB	Aviation support battalion
ASP	ammunition supply point
AVN	aviation
BCT	Brigade combat team
BH	behavioral health
BMM	battlefield mission management
BMO	battalion maintenance officer
BSB	brigade support battalion
CALL	Center for Army Lessons Learned
CAR	combined arms rehearsal
CAS	close air support
CASCOM	Combined Arms Support Command
CASEVAC	casualty evacuation
CATS	Combined Arms Training Strategy
CBRN	chemical, biological, radiological, and nuclear
CCIR	commander's critical information requirement
CDDP	cataloging distribution data processing
CFRR	command family readiness representative
CIP	critical information picture
COA	course of action
COOP	continuity of operations
COP	common operational picture
CP	command post
CSDP	Command Supply Discipline Program

CSM	command sergeant major
CSSB	combat service support battalion
CTC	combat training center
DA	Department of the Army
DAM	decision authority matrix
DRRS-A	Defense Readiness Reporting System-Army
DTMS	Digital Training Management System
DTS	Defense Travel System
EES	Evaluation Entry System
EMS	electromagnetic spectrum
ESR	equipment status report
EW	electronic warfare
FLIPL	Financial Liability Investigations of Property Loss
FLOT	forward line of own troops
FOB	forward operating base
FSC	forward support company
FTCP	field trains command post
GCSS	Global Combat Support System-Army
GPC	government purchase card
GTCC	government travel charge card
HAZAMT	hazardous material
HHC	headquarters and headquarters company
HOPE	higher, operational, planning, and enemy
HQDA	Headquarters, Department of the Army
IPPS	Integrated Personnel and Pay System-Army
ITAP	Integrated Total Army Personnel Database
JMRC	Joint Multinational Readiness Center
JRTC	Joint Readiness Training Center
JTAC	joint tactical air control
KMSOP	knowledge management standard operating procedure
LNO	liaison officer
LOGPAC	logistics package
LPD	leader professional development
LRP	logistic release point
MA	mission analysis

MASCAL	mass casualty
MCOO	mission combined obstacle overlay
MDMP	military decision-making process
MEDO	medical officer
MEDPROS	Medical Protection System
MET	mission essential task
METL	mission essential task list
MOS	military occupational specialty
MP	military police
MTOE	modified table of organization and equipment
NCO	noncommissioned officer
NCOIC	noncommissioned officer in charge
NCOPD	Noncommissioned Officer Professional Development
NTC	National Training Center
OC/T	Observer, coach/trainer
OE	operating environment
OIC	officer in charge
OPORD	operations order
OPS	operations
OR	operational readiness
PA	physician's assistant
PAA	position area for artillery
PACE	primary, alternate, contingency, and emergence (plan)
PAM	pamphlet
PIR	priority of intelligence requirements
PMCS	preventive maintenance checks and services
PSD	proposed sourcing decision
PSOP	plans standard operating procedure
PT	physical training
RDSP	rapid decision and synchronization planning
ROM	receipt of mission
SDNCO	staff duty noncommissioned officer
SDO	staff duty officer
SFRG	Soldier and Family Readiness Group
SGM	sergeant major

SITTEMP	situational template
SJA	staff judge advocate
SLOC	supply storage location
SMART	specific, measurable, achievable, realistic, and timebound (objectives)
SOP	standard operating procedure
SPO	support operations officer
STRAC	Standards in Training Commission
TAC	tactical
TACSOP	Tactical standard operating procedure
TAMIS	Total Ammunition Management Information System
TAMMS	The Army Maintenance Management System
TC	training circular
TDA	table of distribution and allowances
TF	task force
TM	technical manual
TMDE	test, measurement, and diagnostic equipment
TOC	tactical operations center
TOCSOP	tactical standard operating procedure
TOE	table of organization and equipment
TSC	training support center
T2COM	Transformation and Training Command
UAS	unmanned aircraft system
UCMJ	Uniform Code of Military Justice
UDL	unit deadline list
UGV	unmanned ground vehicle
UIC	unit identifier code
UMO	unit maintenance officer
USR	unit status report
USARWHC	U.S. Army Western Hemisphere Command
XO	executive officer



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