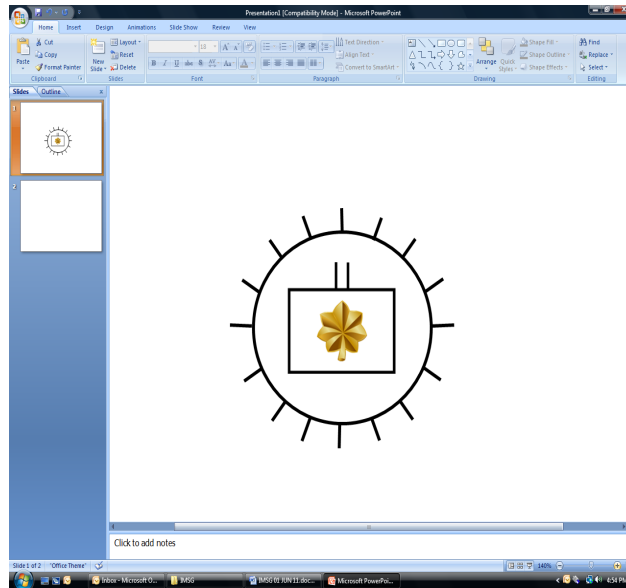


# The Iron Major Survival Guide:

A Not-So-Concise Anthology of Timeless Tips for the Battalion Field Grade



Version 2.0

LTC David Dunphy  
Instructor, Department of Army Tactics  
Command & General Staff College  
Fort Leavenworth, KS

[David.w.dunphy@us.army.mil](mailto:David.w.dunphy@us.army.mil)

(913) 684-2959

June 1, 2011

Preface

Six months ago the first version of the IMSG was published (sort of). Since then, and with many of your ideas and contributions, I've been able to add some new material and adjust the accuracy of some old material. I hope that it may be of some additional benefit to you in your future endeavors.

It is still my hope that by reading this on occasion, you might avoid some of the many pitfalls that I experienced, mostly due to my own ignorance, laziness, stubbornness, or limited mental capacity.

Although there are no guarantees that by reading and abiding by these tenets, you and your unit are assured success, there is little doubt that disregarding them in great measure may contribute in some way to your demise, and more importantly, to that of your unit.

This document is a collection of random thoughts and observations synthesized from my time as a battalion field grade officer and upon reflection as an instructor at CGSC. Some comments may seem simple, obvious, and perhaps even patronizing, and for that, I apologize. Take what you need (if any) and discard the rest. I've tried to keep them as generic as possible, not particularly pertinent to any one branch or any one position (XO, S3, SPO, etc).

In retrospection of my field grade time, I discovered that I had drifted significantly from my optimistic goals and priorities laid out as a student here at ILE in my preparation for battalion field gradeship.

Unfortunately, this became evident to me far too late in my tenure to get myself and my staff back on azimuth in accordance with my earlier set goals and expectations. Interestingly enough, I realized my drift had occurred when I discovered my first OER support form as I cleaned out my desk prior to my PCS.

This was a document that at one time, I had put some serious thought and effort into. But there it was, abandoned and bereft at the bottom of a desk drawer where it remained in ineffective isolation for almost three years. In reflection, I was amazed at how much parallax had been induced between my own reticule aim and the actual goals I achieved, fumbled, or mismanaged as I got caught up in the chaos and challenges inherent in the Iron Major Table VIII. I would submit that referring to that form more frequently, or perhaps a list like the one below, might have served as a re-boresite of sorts to keep me on azimuth with my priorities and leadership philosophy over those tough yet rewarding battalion field grade years.

I would like to acknowledge and thank COL Mark McKnight, LTC(P) John B. Richardson IV, and LTC(Ret) Paul Anderson for their valuable insights and contributions in creating this document for you.

Please continue to submit any additions or recommend changes based on *your* experiences or my inaccuracies so that I might keep this document current and appropriate for the next generation of ILE studs. I wish you, your families, and your units the best of luck.

Best Regards,



David W. Dunphy

LTC, AR

## Table of Contents

### Chapter I: Arithmetic - The Fundamentals

.....	1
. Soldier Basics: Know and Demonstrate Military Customs, Courtesies, and Etiquette	
. Write Well	

- . Proofread Well
- . Don't be an Elitist\*
- . Maintain a Fitness Ethos
- . Email: Combat Multiplier or Lurking Insurgent?

**Chapter II: The Algebra of Maintaining Good**

**Habits** ..... 4

- . Run Meetings Well
- . Manage Your Time
- . Counsel Your Staff\*
- . Sleep Plans
- . Support the HHC COC\*
- . Master & Exploit ABCS (and DTMS)
- . Plan First-Class Ceremonies\*
- . Treat Attachments Like Invited Guests
- . Master Army Property Accountability & Management (*mostly for XO*)\*

**Chapter III: The Trigonometry of Staff Management** .....

..... 13

- . Manage Your Staff
- . Lead Your Staff
- . Develop and Manage a 'System of Systems'
- . Make Time to Train the Staff on MDMP\*
- . "Those Bastards down at Company"
- . "Those Bastards up at Brigade"\*\*\*

**Chapter IV: The Calculus of Field Gradeship:**

..... 18

- . Relationships or Bust
- . Take Care of the Boss\*
- . Working with the Boss\*\*
- . Pick Your Battles Wisely
- . Learn How to Constructively Advise

- . “Coordinate, Anticipate, Verify”
- . AAR Everything\*
- . On Occasion, Take a Knee

## Chapter V: “Live to Fight another Day”

27

- . Don’t Estrange Yourself From Your Senior Rater
- . Manage Your Own Career\*
- . Keep Things in Perspective

\*New or modified content

\*\*New paragraph or topic

## Chapter I: Arithmetic - The Fundamentals

- . **Soldier Basics: Know and Demonstrate Military Customs, Courtesies, and Etiquette.**
  2. Don’t take advantage of the close proximity you may have with your boss/bosses. Don’t get desensitized to senior officers’ presence. **Stand when the commander enters your office (unless told to do otherwise), and always stand when other subordinates are in the room.** If not the CSM, be the person who brings meeting attendees to attention when the commander makes an appearance. Don’t drop “sirs”, don’t slack on saluting, and walk on the left side of a senior officer.
  3. Nothing says ‘Bush League’ like a major caught alone in the open saluting ‘Retreat’ before the cannon. Know what to do during Reveille, Retreat, To the Color, National Anthem, etc, both indoors and out, in formation and out, and in uniform and out.
  4. Leave bad ILE habits at ILE. Don’t walk and talk on a cell phone; don’t salute while talking on a cell phone. Don’t walk and text. Don’t stand around with your hands in your pockets in front of Soldiers. Ditch the fluorescent, one-shouldered ruck-sack, Old Navy snivel gear, and lax briefing habits. Don’t gripe and complain in front of subordinates and beyond closed doors.
  5. **Introduce yourself. Sending a letter of introduction to your incoming brigade commander shows a touch of class and reach-back to good Army tradition and etiquette.** Keep it short, explain your general timeline, and that you look forward to serving ‘in any capacity’ at that great unit.

## Write Well.

1. Tired of hearing CGSC instructors complain about your crappy writing? There's a reason for the emphasis, and a direct correlation to your reputation and ability to positively impact your unit. Most of your communication to higher, adjacent units, and subordinates/staff will be through writing, on email or otherwise. You can't escape it. Your intelligence will be determined, and your reputation built upon your ability to communicate effectively and above the 10<sup>th</sup> grade level through email, memos, SITREPs, SOPs, Training Guidance, policies, 15-6 investigations, Serious Incident Reports (read by the CG), etc.
2. **Keep it succinct and to the point. You are not being graded on volume (well, except at ILE); remember BLUF.**

## Proofread Well.

1. Spell check ≠ proofread.
2. You will/should be the last line of defense for any and all products going to/through the commander and beyond.
3. You may be amazed at how poorly some of your 'college graduate' staff officers will write (NCOERs, awards, INTSUMS, OPORDS, etc). **Develop quality control systems on your staff to ensure a poor product does not end up on your desk without someone other than the writer having proofed it first (a way - find the English or History major on staff and assign him/her the additional duty).** Otherwise, you will spend a good portion of everyday 'grading' & rewriting subordinate products – a major time killer.
4. **Demand quality staff products. Be meticulous early and pay attention to detail (format, commas, grammar, etc). Be ruthless up front with rewrites & redo's and the staff will get the message quickly.**
5. Don't let your boss be *your* designated proofreader. Have a peer - or even a subordinate - proofread your products before they go forward.

**Don't be an Elitist.** You are not authorized an aide de camp. Just because you are the Battalion XO doesn't mean there is some Soldier dedicated to loading your duffle on a flat bed, setting up your cot, or getting you a cup of coffee. Why should you get the TMP van to go to the range and qualify? It may be a matter of time management, but if not, put your ego aside and get on the bus with the rest of the staff and HHC. Besides, that TMP belongs to the CDR and CSM, and you'll probably Q2 anyway. Don't get the boo-boo lip when there's no marked chair for you under the awning at a unit COC, etc. Chances are it wasn't a deliberate slight.

## Maintain a Fitness Ethos.

1. Make PT sacred, both in and out of theater. Don't be the guy who recommends cutting out PT to apply an hour or two to another training event or slide prep for a meeting. You have a lot on your plate, and another hour added to the work day sure would be tempting and convenient, but don't fall into the trap. If it comes to that, then tack on an hour at the end of the day verses trimming out PT.

2. You don't have to be the fastest and strongest guy on staff or in the battalion, but both need to see you doing hard PT daily. **Don't hang out behind your computer 5 or 10 minutes into PT.** Get out before the Flag goes up, and make your staff do hard, visible PT too. A short stretch-ex after Reveille is a good 'bubble-leveler/staff huddle' before the day, but don't let it overtake your PT session – no pen and paper. You can pursue more decentralized staff PT when you trust that they got the message and your intent for quality PT. Give your staff officers the opportunity to conduct PT with their respective sections routinely as well.
3. Whatever you do, don't show up to your unit fat. You instantly lose credibility, and it's a tough hole to dig yourself out of. Don't get fat while in the unit, or while deployed. If you are a border-line turret plug, then drop the chubby snacks, grab some rice cakes, and bust any preconceived notion that you're just 'big boned'. If you need to get taped, then get taped by the HHC 1SG like everyone else. No close-door tape sessions with the OPS SGM in your office, Soldiers will only assume the worst.

#### **Email: Combat Multiplier or Lurking Insurgent?**

1. **Talented officers' careers have ended prematurely because of email blunders. If you wouldn't want to see what you wrote posted in the New York Times or sitting in the Inbox of the CG, then don't write it in an email (this includes Facebook).** As you know, your original email may be attached to a long line of forwards, etc. Once you hit 'send', your words will live in infamy, whether you want them to or not. *Remember, email may be personal but it's never private.*
2. Never write & send an email while angry. If you must, send it only after you've slept on it, you will be amazed at how differently the issue looks the next morning. Even then, have a peer read it before sending. If you demand instant satisfaction, then pick up the phone or go visit the object of your wrath.
3. **Apply some analysis to emails; don't manage/lead your staff by forwarding higher HQ/or the boss' orders. Make them your own. An "FYI" on a forwarded formation time is acceptable, but when the boss writes you and says "I'm tired of units submitting their Green 2 reports late", don't simple forward to company commanders and write "please note BN CDR comments below".**
4. Email Creep. Don't let email become your sole/dominate managing style. Pick up the phone, get out of the office and go find a subordinate; talk face-to-face whenever you can. If you send an important, time-sensitive email or one that requires due-outs, ensure you follow up with a call to the recipients directing them to read it. Staff Duty can help with this.
5. Save every email you send or that's been sent to you (except the risqué stuff). An email historical archive may very well save your hide some day. Organize archived folders for deleted items, sent items, special topics, etc. Create a special folder for 'Boss Emails' that will allow you to review, in one location, all of the taskings, GFI's, or work priorities your boss has sent you.

## Chapter II: The Algebra of Maintaining Good Habits

### Run Meetings Well.

1. Limit meetings and attendees when possible. Remember, the more people you bring into your meetings means fewer things are getting done or supervised concurrently in the unit.
2. Always have a purpose and agenda. If not, your meetings will wonder aimlessly. Ask yourself “Why are we having this meeting?” Is it simply an information brief or are you soliciting guidance or decisions from the commander? If it’s the latter, ensure you prepare the commander ahead of time instead of springing the blank ‘Commander’s Guidance?’ slide on him at the end of the brief and putting him on the spot.
3. Keep meetings short: attention will decrease exponentially after 50 minutes (think ILE classes). Train staff members to be prepared to brief when it’s their turn. Wargame or hand-mike rules in effect: when it’s your turn, push to talk, not to think; know what you want to say, speak confidently and quickly, then hand the mike to the next guy and sit down.
4. Combine IPR topics when possible to limit the number of meetings.
5. Schedule routine/predictable times of the day/week for meetings (training, Command and Staff, resource, maintenance, BUBs, CUAs, targeting, working groups, Log, etc). Obviously, while deployed don’t allow meeting attendees to ‘set patterns’ if patrols are required to shuttle participants.
6. Plan for the inevitable hasty meeting. Establish a “hey you” meeting window regardless if you fill it or not for hasty IPR’s, USR, leader huddles, etc. (i.e. Tue/Thur 1130-1230; lunch meetings, although painful, limit training schedule disruptions).
7. Send a Read-ahead when possible so the audience is smart before they sit down. It will save time and often prevent embarrassment or dime-dropping.

### Manage Your Time.

1. You have heard this throughout your college years and career, but it’s only going to get worse from here on out. Establish a nested unit battle rhythm, both in garrison and deployed. It needs to be nested with subordinate unit events, and certainly higher’s. Limit variance to provide predictability.
2. Establish your own predictable battle rhythm, both in and out of theater. Share your calendar with subordinates so they can see good opportunities to approach you or backbrief you on their work.
3. Set aside time on your calendar for staff product QA/QC, and build in buffer time

for 'fire fighting' and the friction of war. It would be nice if the boss approached you at the same brief, predictable time frame every day to review his priorities of work, but let's face it, that's a pipe dream. He or she is more likely to send you a dozen emails over the course of the day, leave Post-Its and notes on your desk when you're at meetings, and conduct 'drive by shootings' when you're in your office.

So, when the boss strolls in on Monday morning with a note pad full of GFIs and things he/she wants you to get done or check up on, your carefully planned daily schedule and priorities just got bumped or dumped. The boss can be the biggest contributor to your inability to manage your time, but hey, it's the nature of the beast, and he's the boss. Deal with it by building in the time for it. The day your boss stops 'bothering' you with such things is the day you have become irrelevant to him and the organization.

4. **Make family a priority for you and your subordinates.** Take time off for your kid's soccer game on Tuesday afternoon. Allow your subordinates to do the same, but don't get taken advantage of.
5. Don't stay deployed when you're not deployed. If you work until 2100 nightly in garrison, many of your subordinates will feel obligated to do the same, whether they have work to do or not. You will all be miserable as a result, and so will your families. **If you can't get out of the office most nights by 1800, then you are doing a poor job of time and task management.**

#### **Counsel Your Staff.**

1. We pay a lot of lip service to good counseling, but it's still amazing that at every echelon I've taught, the majority of officers continue to state that throughout most of their careers, they received (and admittedly gave) crappy counseling. In class, it's easy to speak to what right looks like, but in units, it still seems to be the first item (right after your OPD program) that falls off of the schedule when the calendar gets busy (which, for most Iron Majors, is always).
2. Counseling is not hard, but it is time consuming and requires preparation. It is, however, one of the most underrated (and underutilized) combat-multipliers you have in your leadership arsenal. An investment in good counseling will pay off in important tangible and intangible ways.
3. **Plan for it on your calendar. Give advance notice to subordinates, and task them to come prepared to talk about the good, the bad, and the ugly. Provide them focus for the session ahead of time.** Task them to provide *you* feedback as well: "S4, what do I need to do or change to better enable you to do your job?"
4. Shut the door, unplug/turn off the phone, and listen. Oftentimes we want to do most of the talking, but solicit ideas from your subordinates on how *they* can improve, and you will have discovered the secret to effective counseling.
5. Comprehensive initial counseling will set the stage for your expectations of your staff officers, and *theirs of you*. Don't forget to provide your subordinates your OER support form, and that of your boss. Have them bring theirs to initial counseling. Hopefully, they will all be nested.
6. The Army counseling statement (DA form 4856) is genius in its simplicity and effectiveness if used correctly. Ensure you utilize the 'Plan of Action' and 'Leader



Responsibilities' blocks of the form. It doesn't have to be a pretty, typed document. Write on it, draw arrows, and connect the plan with your responsibility to them in supporting that plan. Much of it can be filled out during the session. You are, in essence, making a contract with that subordinate. Don't forget the 'Assessment' block at the bottom of every statement; follow up with this at the next counseling session before breaking out a fresh form. Provide them a copy of the statement when complete with the session.

7. Expanding your branch horizons. Whom have you counseled in the past? For most at the senior company grade level, it's probably been a collection of officers/NCOs of similar branches (i.e. a tank company commander counsels tank and/or infantry platoon leaders, ISG, etc). As a battalion Field Grade, it may be the first time in your career that you will be faced with the daunting task of counseling officers well outside of your past traditional roles and experiences. This may include: the chaplain, S1 (AG), S2 (MI), SIGO, Chemo (there's more to being a Chemo than USR), FSO (FA), FRSA (CIV), BMO & BMT (OD), etc. Scoring 'Distinguished' on Tank Table VIII means little to the AG S1 and even less to the unit chaplain. So, how do you sit down with officers of more 'eccentric' origins and conduct effective counseling? **I would recommend doing the research ahead of time with Brigade field grades and senior warrants of their respective branches to determine how best to develop and mentor your subordinates. Try to get copies of Brigade staff counterpart OER support forms, and solicit input from them as to future positions, timelines, and professional development opportunities as well. You can also find a wealth of select branch counseling forms and topics on S3-XO net.**
8. "Drop the Ramp" or "Front Slope Counseling". Don't pass up an opportunity to conduct verbal counseling anywhere or anytime. Pull a subordinate aside in the JSS, RUFMA, or TAA, sit him/her down on a tank mine plow, or on the ramp of an M1068, and 'AAR' his/her performance through a combination of direct and indirect counseling methods.
9. During counseling, provide subordinates with professional timeline and personnel file advice (future jobs, functional area opportunities, board prep, ORB scrubs, DA Photo ROE, etc). You may be surprised at how little they know about the future of their own careers and how to prepare for it.
10. If for whatever lame reason you can't institute good counseling, at a bare minimum you *must* conduct final OER counseling with your junior officers/NCOs. Don't hide behind a PCS and leave a Soldier in the dark by not telling them face-to-face how he/she performed in their service to the unit. You owe it to them, and to that leader's future subordinates.

### **Sleep Plans.**

1. Sleep is a combat multiplier. You may feel that as an 'Iron Major', it's your job to outlast everyone in the HQ or stay up through three shift-changes in the TOC. That may be the case, but only on the most extreme of occasions.
2. **Sound sleep = sound decisions.** Sleep plans are a matter of basic field craft and discipline. Some leaders require 4 hours, others 8 (few need 12). Figure out how

you function best, and stick to it. **If you think staying up for 48 hours will make you more efficient and garner the respect of your subordinates, then you are probably oblivious to the poor decisions you made or the irascibility you demonstrated for them over that time.**

3. Don't try to stay awake through an entire CTC rotation; you're not going to stay up through a year's deployment, so why train that way? You will quickly hit the point of diminishing returns, and returns are what the CTCs are all about. Remember, it's a marathon, not a sprint - train as you fight.

4. **While deployed, don't be afraid of power naps.** It's hard to sleep the same hours every night in theater unless you are on shift, so make up for it when you can.

**Support the HHC COC.** Many of you probably have had the sometimes unenviable job of the HHC/HHT commander in the past, and can attest to the frustrations of dealing with an organization full of captain-peers and majors. For those of you that have been there, now's your chance to experience it from the other side of the fence. Remember the tough position the CO and 1SG are in leading an organization with FG officers and SGMs. Coach the HHC Commander on best practices for managing the challenges of this command.

Ensuring your staff is meeting deadlines helps them immensely. A good relationship with the HHC CDR and 1SG is essential for both battalion field grades, and as many of you know, there are plenty of friction points. Often times the company training meeting with section leader representation is not sufficient to avoid them. Here are some examples to name a few:

1. HHC Formations. They can come in the middle of a staff IPR or at the 'end' of the work day, and few on staff would argue that they are not disruptive. But, categorically exempting your officers from such gatherings often can potentially set them up for failure as well as establish a discouraging trend of 'RHIP' in the eyes of the NCOs and enlisted Soldiers in the unit. HHC formations will allow the COC to best distribute and collect information. Does that mean that every one of your officers is at every formation? Probably not, but talk to the HHC CDR and iron out an acceptable solution.
2. Company-specific events. APFTs, weapons qualifications, Command Maintenance, Services, Mandatory Quarterly Training (CO2, POSH, etc), SRP, weapons draw/cleaning, commo loading & change-over, ISOPREP, holiday parties, FRG meetings, the list goes on and on. These all require the staff's support and necessary crosstalk between you and the HHT CDR, **and if they are not properly forecasted and coordinated with the efforts of your staff, they can become very disruptive to your priorities of work. A good TTP is to bring in the HHT commander to one or two of your weekly staff huddles, preferably at the week's bookends, and share information.** At that point, they can review company-specific training events or other administrative tasks that your encumbered staff may need to attend or pursue over the near term.
3. Managing the Ops SGM and HHC 1SG relationship in regards to the S3 shop personnel may require the FGs to tactfully inject themselves to prevent a catastrophic breakdown that could become cancerous to the unit. Oftentimes the kind of liaisons you have established with the HHC CDR are occurring in parallel between the OPS SGM and the HHC 1SG. This may be cause for confusion, thus having your OPS SGM at your staff huddles may be of some benefit as well.

4. Predictability is key to avoiding conflict & confusion. Create open lines of communication between you and the HHC commander, and force him/her to put things on your calendar as far out as possible so you can synch your staff around them.
5. Don't inhibit property accountability with loose practices. Your decisions as to the arbitrary movement of assets within your respective shops can set the conditions for lost or unaccounted for property (i.e. S3 yells, "my monitor doesn't work anymore, move the Chemo's in here ASAP"). Arguably, the most commonly lost item is a laptop computer or monitor due to hasty repositioning within or between shops without setting the conditions for the hand-receipt paper trail to catch-up. Some events to pay close attention to: turn-in of damaged items; re-imaging of staff laptops coming into and departing theater; chain of custody for staff/shop computers in TOCs or in transit (i.e. an S3 laptop set up in a TOC tent in Kuwait); unplanned equipment swaps when items go down while in the field or conducting operations (generators, specialty tools, computers, weapons optics, etc). **You can mitigate loss by rigidly supporting HHC inventory and accountability policies, and working all property book item or sub-component moves through the Section Sergeant who is responsible for the item.** Ultimately, that's the guy who may end up paying for your haphazard property habits and mandates.

#### **Master & Exploit AB(M)CS (and DTMS).**

1. If your idea of battalion mission command (formerly command & control) in today's fast-paced and ever-changing environments - COIN or otherwise - is through an acetate-covered map with push-pins, then you are probably doing your unit a disservice by not maximizing the potential of the (plethora of) Mission Command Systems at your disposal. Sure, analog back-ups are great, and even a necessity for most operations, but don't hamstring yourself and your unit by being intimidated by AMC systems. You don't need to be the primary CPOF operator in your TOC, but knowing the vast planning and SA capabilities of the system will make you a more effective and efficient field grade. Ultimately, your expertise will show through on behalf of the unit through smooth BUBs/BUAs, effective parallel and collaborative planning, and a COP that allows the commander to make the best and most timely decisions possible.
2. Don't neglect basic FBCB2/BFT proficiency, you may find this will be the best way to C2 (MC?) an operation when the comms architecture won't support it in other ways.
3. On a similar note: if you refer to the FORSCOM CDR's Training and Leader Development Guidance (<https://atn.army.mil/TreeViewCSmenu.aspx?loadTierID=1884&docID=22>), you will see a lot of references to an increased focus on unit proficiency across the FSO. Battalion live-fires, combined-arms breaching and other perishable, MCO-related collective tasks are back on the CTC and home station training menus. So, that hardstand 'steady state' TOC you worked in as a battle captain on a JSS or FOB for a year in theater may not survive first contact in an MCO-oriented exercise or operation. The 8-12 hour set-up time required for the behemoth, multi-bubbled DRASH with its CPOFs, desks, plasmas, projectors, break rooms, Yoga chambers, etc, may not be suited for a battalion attacking across 100 kilometers of desert. **A TOC tends to develop its own gravitational pull after a while, attracting more tents, vehicles, chubby snacks, and yes, even enemy mortar rounds. Think through,**

develop, and rehearse systems and SOPs ahead of time for a leaner C2 structure that can tear-down, jump, set-up, and protect itself rapidly to keep pace with a maneuvering battalion. Do the same for the Rear CP and TAC, and don't forget a stout coffee pot in each.

**Plan First-Class Ceremonies.** This one took me a long time to internalize, much to my own demise, but here's the bottom line: well rehearsed, classy ceremonies reflect a well disciplined and classy unit. Oh, and when a ceremony goes south, expect that an embarrassed commander will promptly reorganize your priorities for you.

1. Ceremonies such as Changes of Command, Changes/Assumption of Responsibility, Post-Deployment Battalion Awards Presentation, Reflagging, Deployment/Redeployment, Grog-bowl, etc, can be resource and time intensive and can oftentimes distract from other missions or priorities. But have no doubt that they all can contribute dynamically to the identity, pride, and reputation of the unit, for better or for worse.
2. Treat a ceremony like any other major training event or operation. Apply an 8-step Training Model approach, and you will produce a first class event every time. Typically, a ceremony will involve: a deliberate OPORD published well outside of the near-term training schedule, IPRs, site reconnaissance, confirmation of resources, coordination with Protocol, invites & RSVPs, and lots of rehearsals, to name but a few.
3. Although your OPS SGM and/or CSM may be the point guys on this operation, especially with taskings, it will still require participation from and synchronization of the entire staff to pull together a good ceremony. Also, don't expect a random captain in the 3 shop to put together something of this magnitude. Project officers are handy, but they can't go it alone.
4. Protocol is important and integral to making people feel welcome. It's got nothing to do with ego and everything to do with etiquette and courtesy. If you have doubts, contact the Post Protocol office and get advice and answers. Don't set up your unit and your commander for potential embarrassment by not having your staff do the leg-work ahead of time.

**Treat Attachments Like Invited Guests.** Many of you have been there before, perhaps as a MITT chief in Theater, a Sapper PL cut to the breach company, an ADA section set in the BSA, a CA team supporting a maneuver battalion, etc. Many were unlucky enough to be 'sliced' to a unit that treated your team as an afterthought and maybe even a nuisance.

Relegated to a peanut-gallery seat during orders development or targeting meetings, forced to dig up your own Class IX parts and supply items, considered second-class citizens at unit social events (if you were even invited), left out in the cold when it came to evaluation reports or awards, the list of affronts is vast. As one might expect, attachment's perception of a lack of support is soon reciprocated, thus creating a vicious cycle of poor motivation and degraded complementary or reinforcing capability – on the part of both of you and your hosting unit. Interdict this cycle by aggressive integration of attachments into your unit, regardless of the duration and command/support relationship. Some TTPs:

1. Understand command relationships and support relationships, and what's inherent in both. There are vast differences in expectations for TACON verses ATTACHED units, just as there are for DIRECT SUPPORT and GENERAL SUPPORT REINFORCING units. There are also plenty of issues that aren't clearly spelled out

by the doctrinal definitions of both. Carefully analyze (gaining) host-unit obligations and attached unit (losing) higher HQ responsibilities. Determine, then plan and resource these requirements thoroughly. It will probably require a comprehensive staff mission analysis to tackle this from all aspects. Some common issues to work out: billeting, food head-count, specialized maintenance support & Class IX flow, PBUSE operations, motorpool/TAA space, OER/NCOERs, awards, EML tracking, mail distribution, ADO ordering & distribution, FOO expenditures, SOP & battle rhythm integration, reports and reporting procedures, tasking authority, ammunition account management & resupply, ISOPREP, server/domain integration, MEDPROS & medical records, BFT addresses, manifesting, investigation responsibilities, UCMJ, CCIR notification & information flow, FRGs, etc.

2. Take a close look at the level of support your attached unit is getting from their own organic headquarters. If for some reason they are not receiving the same level of support as your Soldiers are, regardless of the specified relationship, your unit may have to make up the differences to ward off any perceived peer deprivation.
3. Make space at the Big-Boy table for attachments. An attached FA battery commander & ISG should get a spot at the table right next to the organic infantry company guys. Introduce and welcome new attachments to the audience, include them on meeting agendas and give them time to brief.
4. Attachments are usually the smartest guys/girls in the room at their respective trades. Solicit input from attached leaders as to how best they can support the plan. This creates buy-in, inclusion, and loyalty as well as optimizing their potential contributions to your unit's efforts.
5. Integrate attachments into unit social functions, both State-side and in-Theater. This can range from unit BBQ's, organization days, award, patch, & spur ceremonies, unit birthdays, OPDs, staff rides, changes-of-command/responsibility, etc.
6. Here's the bottom line: taking care of Soldiers is a universal responsibility, regardless of whether they're yours or not. If you treat attachments like they are VIP special guests at Thanksgiving dinner, they will most likely bend over backwards to contribute to your unit's fight.

#### **Master Army Property Accountability & Management (*mostly for XOs*).**

1. Why should you care about property management in your unit when the only thing you and your commander need be signed for these days is your TA-50 and lap top? One painful acronym: FLIPL (Financial Liability Investigation for Property Loss). You, as the XO, still have a 'supervisory' responsibility to make sure the unit follows sound property management procedures. The boss (and BDE) will be looking to you to manage FLIPLs within your organization. With company commanders spending most of their commissioned time in and out of theater, you may be surprised at how little some know about CSDP. Close behind poor judgment and the loss of sensitive items, property mismanagement will get company commanders fired quickly, both CONUS and abroad.
2. Understand the following: shortage annexes, non-expendable shortage annexes, PBUSE capabilities, supply item codes (expendable, non-expendable, durable), commander's write-off procedures, 10%/monthly inventories, and sensitive item inventories – in both deployed and garrison environments.

3. Enforce a strict 'hands & eyes on' approach for inventories. Temporary hand receipts or turn-in documents from DRMO for company NVGs getting purged does not equal 'item accounted for' on monthly sensitive item inventories. It's painful, but the inventorying officer needs to go to the workshop and lay hands on the items. If a deployed company has a radio or computer turned in for repair, and it's still in theater, then ensure the inventory officer does everything he/she can do to get eyes on. This may involve helicopters and/or patrols. If the inventory officer is someone other than the commander (reg allows E7 and up), ensure that companies have certified and validated their inspectors.
4. No Free Chicken. Note that just because an item is expendable or durable doesn't mean company commanders can choose to disregard responsibility for the item. Many of these items are very expensive (impact wrench, ratchets, torque wrenches, etc) and impending budget constraints will hold commanders more accountable in the future. The days of 'blank check' ordering for these category items are drawing/have drawn to a close, even for deployed units. Influence commanders to hold HR holders accountable and utilize statements of charges and write-offs when they are warranted.
5. When you deploy, don't let companies try to slicky-split property books. Don't let commanders try and cut a deal with a rear-D commander to store & inventory PB items. Connexes and HQ's in the Rear will get moved, have to be turned in, or the Rear-D commander will switch out while the unit is deployed. All of this may result in PB items getting misplaced and lost. It may require a comprehensive Rear-D connex inspection on your part to ensure no jack-assery has occurred prior to your deployment.
6. If your companies order and receive high-dollar items that don't come to the unit through the PBO, put the items on the books or they will walk. ACOGs, GPS's, and off-the-shelf specialty tool are good examples of big money items that may 'exfiltrate' the unit upon redeployment if not properly accounted for.
7. Get your S4 shop in on training and unit QA/QC. Look for a great S4 NCOIC with plenty of years of Supply Sergeant time who can mentor company supply guys and XO's and conduct courtesy inspections of company property management procedures on a monthly basis. This kind of scrutiny will minimize FLIPLs and keep you and your battalion off of damning BDE command & staff, deployment, & redeployment IPR stick-in-the-eye slides. Most Brigade Commanders will insist that all FLIPLs are rectified prior to deployment & redeployment, so don't delay in assigning competent IO's and crack the whip on getting them done post-haste.
8. Ensure you assign an officer (most likely your S4) to aggressively track FLIPL statuses and location. This includes further defining the nebulous location of 'up at Brigade'. Track *whose* office it's in and *when* it got there to include: 'with IO', 'at company', BN Command Group, Legal, BDE XO, BDE CDR, etc.

### Chapter III: The Trigonometry of Staff Management



## Manage Your Staff.

1. **Leading ≠ managing.** There are overlaps of course, but understand the finer differences. Figure out how to assign tasks, give guidance, establish suspenses, *follow up*, and quality control. It's easy to hand out tasks, it's harder to remember to keep track and follow up.
2. Develop a system of **task management.** It might simply be dog-eared pages of your poop book with checked boxes & bullets, or a digital system like Outlook. I recommend a combination of both. Learn about and utilize the task management tools that Microsoft Outlook has, it will save you time and prevent 'dropped balls'.
3. **Don't be afraid to give officers tasks outside of their doctrinal range fans, especially if the primary officer is incapable or overly tasked already.** Example: when the S1 is up to his armpits in managing the manifesting for a deployment, hand over responsibility for C2ing the Staff Duty to the SIGO, who may or may not be decisively engaged at the time.
4. For a quick study on organizational management, I recommend reading [The One Minute Manager](#) by [Kenneth Blanchard](#), Ph.D. and [Spencer Johnson](#), M.D., and [The One Minute Manager Meets the Monkey](#) by Kenneth H. Blanchard. Both can be read in less than 3 hours (get the unabridged audio books read by the authors for another time-saver).

## Lead Your Staff.

1. "No kidding", you say. Don't be surprised at how you might compromise your own leadership philosophies when you assume the role of an "Iron Major", and get caught up in the race trying to produce slides, meet deadlines, and take care of the unit and boss. That philosophy you spent so many years perfecting may devolve into something as simple and demoralizing as "row well and live, trooper".  
**Remember, that in addition to managing your staff, you still have to 'lead' your staff.** Many a good junior officer has decided to bail on the Army because of a bad experience on a staff, most of which were instigated by a leader who didn't care enough to lead them.
2. When I was a platoon leader, then MG Swartz, the 4ID CG, created and posted 'T.I.P.S' signs throughout the post. I still find it a useful tool today: Talk to Soldiers, keep Soldiers Informed, be Predictable, and be Sensitive to Soldiers' needs. It may sound a little cheesy, but it's spot on. Don't fail to remember that despite getting paid the 'big bucks' (relative term as you well know), junior officers are Soldiers too. **Recognize their efforts in front of the boss, put them in for awards, counsel them, and care about their well being and that of their families. Do the same for your NCOs.**

## Develop and Manage a 'System of Systems'.

1. Many are familiar with small unit 'actions on contact' or battle drills; apply the same methodology to the development of systems to cope with information flow, administration, and critical events. A system is defined as a combination of related parts organized into a complex whole; think 'Staff Battle Drill'. **Undoubtedly, when something goes wrong, the first question a 15-6 officer asks is "what systems did your unit have in place prior to this event?"**

2. Don't wait until your unit experiences trauma to figure out what to do. Think things through ahead of time, and work on unit and staff-wide 'battle drills' for both garrison and forward deployed operations to address such sobering events as suicide ideations and attempts, off-duty accidents and training/combat-related fatalities & severe injuries, a Soldier/family member serious or violent crime, loss of sensitive items, etc. Hopefully, there is an SOP in place, and if so, take the time to closely scrutinize it, and ensure your staff knows exactly what to do when the time comes.
3. Develop a system within the battalion that addresses information management such as document flow to and through the command group (OERs/NCOERs, Chapters, Awards, Policy Memos, ammunition requests, FOO requests, reconciliation docs, etc). Develop and enforce a staffing worksheet standard for every document that hits the command group's desk.
4. Develop systems within your unit's staff duty to manage information and knowledge efficiently and expeditiously. Treat the Staff Duty like a forward-deployed TOC. Establish and manage CCIR. Ensure a staff officer has over-watch on updating their books, calling rosters, DA 6's, in/out briefs etc. This may be a responsibility discussed and shared with the CSM as well.
5. Here are but a few additional areas that might warrant a 'systems' approach, both in and out of theater: MEBs, chapters, turning in broken computers, radios, and sensitive items, managing Recoverables, unit equipment dispatching, services (all types), ammunition forecasting, AOAP & TMDE, 5988 processing, unit DTMS and training schedule approval, evaluation & award processing, managing non-deployable Soldiers, COMSEC changeover, block leave procedures, EPA spills, FLIPLs, SIRs, etc. The list is stout. Pin the rose on staff officers (through initial counseling) to maintain their respective systems and to exercise & update the SOP. Ensure your systems and SOPs support and are nested with Higher's, and use the IG's office to help validate your systems when in garrison. Solicit input from adjacent units and *S3-XO Net/BCKS* for more assistance (not a member? Join at <https://s3-xonet.army.mil>). You should not have to reinvent the wheel; the odds are that someone smarter than you has already developed a proven system for much of what's been discussed above.
6. Rehearse, rehearse, rehearse. Proof your systems with notice and no-notice rehearsals.

#### **Make Time to Train the Staff on MDMP.**

1. You will find that many Career Course graduates and junior officers will arrive at your staff with little to no knowledge or experience in MDMP, especially at the battalion level. In addition, our prolonged experience in COIN may have allowed our MDMP and synchronizing skills to atrophy somewhat, especially in relation to MCO. Historically, I find that only about 30-40% of majors in staff groups at ILE have had formal experience participating in an MDMP before, through no fault of your own. You war-fighters have been kicking in doors, clearing routes and hill-tops, and training foreign security forces for ten years running now. Be cognizant of the trade-offs. The time to train your staff is not when MCTP (formerly BCTP) shows up on your doorstep. Make and take the time to train the staff on MDMP out of contact and well before CPXs, CTCs, and deployments.



2. I recommend utilizing the installation Simulations or Warfighter centers, where you can sometimes fall in on existing 'TOCs', CCTTs, hard and software (B(M)CS) systems, expertise, and classrooms, all away from the distractions of the BN HQ and email. Spend low-stress time here reviewing, training, and experiencing MDMP and developing/refining planning SOPs and staff estimates. When you feel more comfortable with the staff, nest the training with CP setups in the HQ backyard, a great place to evaluate set-up, refine systems, and rehearse outside of the scrutinizing gaze of 'Higher'. When you feel really comfortable, invite the commander to participate. When he/she feels comfortable, then strike out for 'design' integration!
3. This sounds good on paper, but the dizzying array of colors, shapes, and micro-fonts that will be your training calendar may discourage you from attempting this. Don't let it, get it in your QTG and/or nest it with other BN training events like gunneries or Platoon STX.

**“Those Bastards down at Company.”** You are probably familiar with the 'bastards up at platoon' joke, but don't be surprised when you and your staff start thinking along the opposite lines: 'those bastards down at company'. You may be astonished at how the space between the battalion HQ and the company CPs starts to look more and more like a DMZ over time. Tension between the staff and companies is common, but if not checked, it can be debilitating to the unit. Below are some common observations:

1. IPRs and meetings devolve into dime-dropping sessions as staff officers try to leverage companies into compliance with due-outs or FRAGOs. Nothing energizes company commanders like bold, red bubbles or 'delinquent' next to their unit call sign on a Command and Staff slide. This technique has its place, but never use unannounced. Ensure the dirty laundry has been aired out ahead of time, and subordinate unit attendees know what turds may be floating their way when they step foot in the conference room. That way they can come prepared to 'alibi' or discuss a 'way ahead' without being put on the spot in front of their boss.
2. Dipping multiple staff soda-straws into companies. The following scenario is not uncommon: the Chemo walks over to the companies and states to 1SGs that he needs this month's USR data by COB Friday; the S1 subsequently calls the company training clerk and wants the requirements for personnel shortages submitted by COB Friday; the S4 calls the company XOs and demands the top ten equipment shortage list by COB Friday; the S3 calls commanders for an updated crew roster by COB Friday; the BN XO calls commanders and personally reiterates the importance of submitting personnel and equipment data by COB Friday. You can see how this might quickly frustrate a company commander and 1SG. If the staff requires data or products from subordinate units, ensure it gets consolidated, proofed, and issued out in the Daily FRAGO. No other medium should be tolerated. Then, the 3 shop can maintain a highly visible, on-line, and updated 'FRAGO compliance – suspense tracker' spreadsheet so that there are no surprises for anyone.
3. Staff sections don't maintain a 'customer service' oriented attitude when dealing with companies. Sometimes staff officers start to think that their affiliation and proximity with the Battalion headquarters means that companies answer to them and not the other way around. The Battalion Commander will have a big say in the role of the staff in relation to subordinates, and it will fall on you to enforce his/her intent. Many may prefer that staffs support both the battalion commander and company commanders (in that order). Staff guys are busy, and it will be a challenge

for you to instill a ‘drop everything’ mentality on a staff section when a 1SG or company commander needs a hand with something. If it’s not in conflict with something the BN CDR wants, then they may need to. **If you can breed that kind of service-oriented philosophy, the sense of unity of effort and mutual support between staff and companies will reap huge benefits in more important ways.**

4. **When units continually fail to meet suspenses and deadlines, utilize EoF procedures. Don’t run into the BN CDR’s office complaining the moment A Troop fails to turn in their training schedules on time.** Start with your Chops/Battle CPT making the reminder call. Still no response? Maybe it’s time for the OPS SGM to work over a 1SG. Nothing yet? Now it might take a major to get on the phone with a company commander. Up the ante once more by paying an office visit. Be cautious though, when that happens too often, company commanders may become desensitized to your nagging, so pick and choose carefully when you need to weigh in. **When it becomes glaringly obvious that a commander is just not pulling his/her weight or deliberately blowing you off, then ask your commander for help. Come armed with facts and trend analysis, and maybe even a draft email.** You or the OPS SGM may also choose to approach the CSM with the issue, and let him/her work it through the 1SGs in a less visible yet highly effective fashion.

#### “Those Bastards up at Brigade.”

1. Your higher headquarters will undoubtedly serve as one of the greatest sources of your daily frustrations. The FRAGOs, taskings, GFIs, taskings, no-notice meetings, taskings, immediate RFIs, etc, may get you thinking after a while that Brigade has it out for us: “they just don’t like the Cav”; “they’re biased against Sustainers”; “envious of us FA guys”; “if you’re not an infantry battalion, they don’t care about you”; pick your complex. **Just remember, those folks that work in the various sweat shops up at Brigade are most likely your peers and former classmates. They too are Good Americans and don’t wake up in the morning saying to themselves “how can I stick it to the Support Battalion today?”** They are fallible, toiling in the salt mines, trying to manage resources and solve problems. They don’t have time to develop and nurture a grudge against your unit, so don’t take it personally, and don’t make mountains out of mole-hills.
2. That being said, work to build trust with Brigade staff. Don’t dime them out at meetings without prior warning. Most issues can be resolved outside of public forums. Don’t be the guy who sharp shoots brigade staff officers and their products in meetings in front of their boss. When you need that guy/girl to do something for you in a pinch (like update a bad stat on a Command & Staff slide minutes before the BDE meeting), they may not be there for you. Ultimately, your unit suffers. Remember, these guys are your peers or work for your peers. If you earn a reputation as a sharp-shooter or backstabber with your peers on the Brigade Staff you will hurt yourself and by extension hurt your unit. The Brigade Staff has the ear of the BCT Commander...he will learn of your reputation from his staff. Keep them on your team for the good of all.

18-5

## Relationships or Bust.

1. They matter...a lot. Don't think that by sheer rank and intimidation that you will be able to bull your way through the 'Iron Jobs' to success. You need to solicit buy-in, loyalty, and trust, from up, down, left & right, and beyond. **Your influence in and outside of your unit will have a direct correlation to your success as an S3 or XO, and ultimately, the unit's.**
2. One of the most challenging relationships is oftentimes with your fellow battalion field grade(s).
  - **Working within the commander's intent, sit down early with your peer and iron out potential friction points. Establish your respective boundaries and domains, and don't assume that doctrine clearly dictates what the two of you do. Some areas that need further clarification: USR & Chemo management, Battle Rhythm management, TOC operations, operational C2, OPS SGM management, taskings for investigations, S2 C2, MDMP, ISR planning & synchronizing, fusion cell ops, Staff huddle attendees, Command Maintenance attendees, BUA/CUA prep, IPR chairs, Staff PT, event scheduling (services, inventories, etc.).**
  - The two of you may not see eye-to-eye on every issue, and that's **fine. Don't feel that you both need to speak as one to the commander. This limits options for the boss and creates group-think.** If you are going to recommend a different COA than your counterpart, give the other the courtesy that you are going to see the boss so your peer does not think you are trying to backdoor him. Maintaining trust in the competitive world of Iron Majors in KD jobs is essential to providing your organization with professional senior leadership.
  - The two of you don't even need to be friends, but it does help. You do, however, need to respect and support each other. If the staff or others in the unit determine that there is a rift between the two of you, expect many to exploit the seam with 'play mommy against daddy' games.
  - Don't make the boss be the referee or marriage counselor between the two field grades. He/she has enough personnel friction to deal with; don't waste the commander's time with FG relationship issues.
  - Don't forget to cross-train roles as you will most likely have to assume the responsibilities of the other for undetermined periods of time (leave, EML, PCS, etc).
3. Within the organization, build trusting relationships with the OPS SGM and 1SGs. They hold the information reins of the unit. They more than any others understand the impact of your planning & GFIs. Their feedback can be invaluable. Try to throw your bulk around these folks, and you'll find yourself out in the cold, isolated and ineffective. The OPS SGM may get handed from major to major when the unit is deployed, in the field, or back in garrison. Between you and your peer, figure out how to minimize the impact of the SGM shuffle so you both can maintain open lines of communication without overburdening him.

4. Get your boss's intent on your relationship with the CSM. Divvy up responsibilities early to prevent clashes or underlaps (i.e. non-deployable rosters, Chapters, MEB/MMRB tracking, MEDPROS, staff NCO moves, staff duty, ceremonies, calendar impact events (NCODP, SOM/Promo Board, EIB, EFMB, etc.)). Then, meet with the CSM at his/her discretion and work out the details.
5. **Be a sounding board for company commanders.** Be approachable; coach, teach and informally mentor. Provide top cover and set yourself up to be a 'GFI' sounding board for company commanders. Protect them from themselves. You may have to be the 'bad cop' with them at times, but make sure they always feel they can still come to you for advice and guidance.
6. Outside of the organization get to know and share information/ideas with field grades in adjacent units, the SPO shop, and on Brigade staff. **Don't hoard ideas.** Foster a constructive, sharing network with your peers and it will reap huge benefits and save time. Share/ask for things like SOP's, meeting formats, policy memos, OPOD formats, NSNs, TTPs, example investigations, etc. **Typically, your senior rater (BDE CDR) places as much weight on your ability to work *with* others as he/she does on how strong you are as an individual performer.**
7. Make a friend at JAG/Legal. He/she is in a prime position to assist your unit with chapters, FLIPLs, 15-6, and other investigations. Borrow and include your legal clerk in BN Command & Staff meetings to brief chapter statuses and UCMJ.
8. Get to know the DA civilians that work at/run agencies on post. DOL, DOIM, ITO, TASC, ASP, SIM Center, AMC, Range Control/Services, MWR, SRP site, CIF, Safety Office, EPA rep, Hospital MEB manager, Washrack, PBO – many can be great allies and help you in a pinch when the fog of war/training kicks in. **Treat them with respect, slip them some coins and certificates of appreciation on occasion, and recognize their efforts to their bosses, and you may have a friend and ally for life.**
9. Don't be afraid of the IG's office. It may sound trite, but they really are "here to help". With your commander's knowledge and approval, take advantage of their Remission Assistance Visits (RAVs) and other courtesy inspections to help you stand-up/correct battalion systems, especially during Reset. Many IG offices will have a huge data base of SOPs for just about any system you can think of, maintenance SOPs to ammunition management. Don't wait until the DIV mandated Command Inspection Program (CIP) to figure out (along with your BDE and DIV CDRs) that your systems are defunct.

#### **Take Care of the Boss.**

1. When you take care of the boss, you take care of the unit. Fight the close fights and run the daily operations of the battalion to allow your boss time spent on the GFI bus looking at the bigger picture or the deep fight (undocrinally speaking). **Remember, however, that the close fight is not the knife fight. Let your staff do that so you can spend unobstructed time thinking about and developing systems.**
2. **Ensure your boss has the most accurate and up-to-date information before he/she steps into his/her next meeting at Brigade (command and staff, USR, CUAs & BUAs, OPOD backbrief/confirmation briefs, etc). When your boss gets chewed on, it's probably due to something you failed to do to set him/her up for success.**

**You should take it personally.**

3. Establish a screen line. Company commanders get to ride the Green Tab Express to the battalion commander's office, but few others should. Don't let your staff officers or other random choagies approach the commander without having seen you or the adjutant first (preferably in reverse order). That is, of course, unless they are exercising his open door policy to complain about you.
4. So, what happens in the rare event that you find yourself working for some draconian, selfish boss that, despite your best efforts, you just can't seem to figure out how to like or respect beyond the silver oak leaf? If that unlucky guy is you, then you'll just have to get over it for the benefit of the unit. You may find yourself having to run more interference for subordinate units and staff sections as a result, but making your boss look good will most likely have a positive impact on your unit and its Soldiers. Regardless of what you perceive the commander's personal motives are, or whether or not you agree with them, your support for the commander better lends itself to supporting the unit.
5. Influence your boss to go home by 1800, for his/her own sanity...and yours.

### **Working with the Boss.**

1. Try hard to understand how the boss thinks and interprets data. Determine how the boss processes information; is he/she a visual, verbal, or text learner? Is he/she at optimal efficiency in the morning, afternoon, or evening? Does the boss understand the OE through meetings and dialogue, or through read-ahead packets, decision memos, and post-meeting reflections? Comprehending how the boss thinks and when the boss thinks best will enable you to better package information and convert it into viable and actionable knowledge for the commander. Don't be afraid to tell the boss how *you* think, learn, and process as well. This may enable him/her to issue more understandable guidance to you. You may be at opposite corners of the Myers-Briggs Type Indicator matrix, but it doesn't need to inhibit shared understanding between the two of you.
2. Track decisions facing the commander, both internal to the organization and beyond. Recall that one of the fundamental purposes of the staff is to manage and analyze the tomes of information that enter the unit from all directions on a daily basis, and reduce it down to digestible chunks that will enable the commander first to understand, then to make informed decisions. Define and understand the milestones and timelines that support his or her decisions. You may want to consider a 'Lines of Effort' or DSM approach, which visualizes in time and space the potential decision points the commander needs to make by critical event, what information is required to make the decision, and when they need to be made. Also understand your higher HQ's decisions and their potential implications on your unit and boss as well.
3. Support the boss's decisions, for better or for worse (within moral and legal range fans, of course). Beware of the ego-facilitated pit fall of doing the contrary, whether overtly or subconsciously. The boss may prompt you for your opinion as to what of two COAs you think is best. Despite your vehement loathing for the other COA, and the logical and eloquent case you may have presented in favor of yours, don't be personally offended when your recommendation or COA is rejected in favor of another. When the boss finally decides to pursue a COA whether it be the one you

advised or not, you now have the often difficult obligation of owning it yourself, lock, stock and barrel. You must dedicate yourself and the staff *completely* to its execution. In the dark recesses of your brain where your bruised ego goes to lick its wounds, you may secretly want the boss's COA to fail just to prove that you were right to begin with. **This malicious desire may induce skew on your ability or that of the staff's to accomplish the mission according to the commander's intent.** The staff can't be allowed to detect an ounce of doubt or cynicism on your part, as they will be that much more disinclined to support it themselves. This can be a real challenge for some; don't let it be for you.

4. The Inner Circle of Trust. As a battalion Field Grade, you gain automatic entry into the Enclave of the Big Five (CDR, CSM, SGM, XO, S3). It does not, however, grant you membership and immediate access into the more prestigious and coveted Inner Circle of Trust. This may take some time, as trust requires, and often depends on many variables, mostly centered on your boss's personal preferences and your ability to listen and provide sound and candid advice when called upon (read (E) below). Many bosses will look to someone like the XO or S3 to vent, rant, and rave about Higher, peer units, subordinate leaders, silly policies, or even personal problems. They may look to someone to bounce ideas off of, some of dubious quality no doubt. Those select few sounding boards constitute the members of the Inner Circle of Trust. Once mutual trust is established between you and the boss, you need to respect the Vegas ROE and the Cardinal Rule of Privileged Information: i.e. what's said in the boss's office stays in the boss's office unless specifically told to do otherwise. If you have any doubts as to the public release of information discussed between you and the commander, seek immediate clarification. When you violate this Rule, you may find yourself, in the words of COL Mark McKnight, "voted off the island". Welcome to the purgatory of irrelevance.

#### **Pick Your Battles Wisely.**

1. When the 3<sup>rd</sup> tasking of the day from the Brigade S3 hits your inbox, you might feel the urge to grab the phone and give him/her an earful. When your companies get split down the middle on multiple deployment flights while your sister units deploy intact, you might feel inclined to call the BDE XO and ask "WTF?" As an Iron Major, you will probably find yourself frustrated or angered by Higher on a daily, if not hourly basis. And with each additional frustration, the urge to gripe to them becomes almost irresistible. But before you fly off the handle in an attempt to protect your Soldiers and unit from perceived injustice, **do some careful analysis.** Do the fact checking and trend analysis and figure out if your argument is worth the 'currency' you may have to spend on it to get your way. You don't want to gain the reputation in the brigade as the constant complainer or the whiner. Ultimately, higher HQ will become desensitized to your appeals, and when it really counts, your argument will fall flat. Pick and choose carefully the fights you want to fight. ***Saying 'yes' 9 of 10 times grants you the currency, and probably the desired response, when you finally do need to say 'no'.***
2. You may choose to fire a Silver Bullet in the form of getting your boss involved. Ensure you do your homework first and have all the facts before your commander gets on the phone with his boss and tries to lay out a half-baked or unjustified case. You will both lose Wasta if such an event unfolds and your boss will be less inclined to get involved on your behalf again.



3. Sometimes your boss may choose to get involved without your prompting: “I’m a battalion commander, by God, no brigade staff officer is going to tell me what I can’t do, hand me the phone, XO!” Assist your boss in this endeavor as well. Sometimes you may have to approach him without challenging his authority in public and the two of you do some joint risk assessment on the “fight” you are about to embark on. Use your expertise and knowledge of BDE Staff to convince him of a softer approach and to allow you to skin the cat a different way as long as his intent is still met.

#### **Learn How to Constructively Advise.**

1. Like the CSM, the battalion Field Grade is an advisor to the commander. Good advising is somewhat of an art. It may be a challenge at times to convey your point to the commander without putting him/her on the defensive. This requires careful ‘METT-TC’ analysis to determine how and when your boss wants or even needs advice.
2. Don’t be in a rush to thrust your opinion upon the boss, but when asked, be candid and tactful – a carefully balanced combination. If you feel that you are obligated to share your unsolicited thoughts with the boss for the betterment of the unit, seek counsel with your peer and the CSM first to get their thoughts. If they have similar opinions, then you may be on to something. Sometimes, getting the boss to ask you what you think about an issue may require you to first ask the boss the question, then wait for the counter-question.
3. Don’t fall victim to group-think. When asked tell the boss what you really think whether it’s in line with the others or not (tread lightly though). You all owe it to the boss to think through problems from multiple perspectives.

“Coordinate, Anticipate, Verify” - or ‘CAV’ for short. One of my boss’s favorite acronyms and one that I failed to recall often enough. We can see these terms represented in many facets throughout the MDMP, but this quick rule of thumb can be applied to just about everything from running a battalion ball to preparing for a deliberate attack.

1. Most are familiar with and confident in their ability to coordinate for an operation or event, but the art of ‘Anticipate’ and the science of ‘Verify’ are sometimes overlooked. ‘Anticipate’ requires some careful analysis and brainstorming, and may result in additional branch plans. They are, in essence, the “what if’s” of an operation. Some examples: “what happens if the wireless mike goes out during the guest speaker’s speech?”, “if the busses don’t show for range transportation, what’s the back-up?”, “what’s the plan for fueling the TOC generators if the LOGPAC gets interdicted on the way to the JSS?” Yes, it can be a slippery-slope, and only your experience can guide you as to whether or not you have anticipated enough realistic ‘frictions of war’ for a particular event. As you know, the plan rarely survives first contact with the enemy, both figuratively and literally, so do the legwork ahead of time to cope with the inevitability of change.
2. What separates good FGs and great FGs is their ability to master these anticipatory skills. The ability to anticipate and fix problems before they happen is why FG officers are paid the big bucks. Key to this is time to *think*. Get yourself out of the knife fight early and often. Hold your staff to extremely high standards early so you can build a level of trust and confidence in them that allows you to decentralize

taskings and grants you the space and time to ask the “what if?” Spend your time anticipating what could go wrong then take steps to avoid failure.

3. The last step, ‘verify’, is perhaps the simplest but most neglected. Verify doesn’t mean micromanage; it may mean simply that you have to verify that subordinate staff members have verified. Examples: verify through a General’s aide that they will or will not be attending your battalion ceremony, verify that the contractor will, in fact, provide the crane (and backup?) for tonight’s T-wall emplacement mission, verify that the medics will be at the range on time with the proper evac vehicle, verify that your staff got the word about bringing in their promasks for inventory on Monday, etc. There is a lot of overlap with ‘verify’ and the management process of ‘follow-up’. Become a master at both, and you will effectively put Murphy back in his cage.
4. An action passed is not an action complete. The days of saying I told so-and-so to do it or “Sir, we coordinated with TMP and they said they never saw the request...” are over. **As Field Grades, the only thing that matters is results. The buck stops with you.** If a ceremony flops, a training event is cancelled, or a suspense is missed, there is no one to blame but you. If you took the CAV concept to the fullest extent and Murphy still shows up, your boss will understand, but short of that there is no excuse.

**AAR Everything.** One of the Army’s greatest cultural norms is our ability to frankly assess our performance as individuals and teams. Complacency often comes with our inability to look objectively at our own systems, SOPs, and TTPs. Applying an AAR philosophy to everything you do will enable you to maintain current and effective systems.

1. AARs: the basics. Most are intimately familiar with conducting AARs orienting on a unit’s performance of a collective task, especially during training. What is equally important is to conduct AARs orienting on the conduct and effectiveness of the training itself. **Don’t pet yourselves too long on what went well. Note it, and move on to the dirty stuff. Spend a minimum of 75% of AAR time analyzing what went wrong and how best can we fix it for next time.** Like an AA meeting, the healing can’t begin until we admit our problem. This requires humility on everyone’s part, especially leaders. Leaders who aren’t afraid to stand up and say “we culminated in the breach because I failed to do \_\_\_\_” inspire subordinate leaders and Soldiers at every echelon to conduct constructive introspection as well. This creates a synergistic, multi-echeloned effort to identify and fix mistakes across the depth and breadth of an organization. *Oftentimes, our biggest obstacle to learning is our own ego.* Swallow your pride for the greater benefit and growth of the unit.
2. “None of us is as smart as all of us.” Good leaders and leaders of AARs do less dictating and more soliciting: “how do we fix this problem, staff?” Soliciting ideas from subordinates engenders buy-in and dedication that may surpass your ability to inspire them with your own perceived brilliance. You may already know the answer to the question, but clamp your soup-coolers and lead your organization on a voyage of self discovery. You will be pleasantly surprised with the imagination and ingenuity of unrestrained and critical thinking.
3. **Spend time AARing your systems. Relook your battle rhythm and weekly meetings. Spend ten minutes after a Command & Staff and ask “how can we make this meeting better and more applicable? What slides need to stay or go? How can we**



as a staff better set you companies up for success?” When your unit has to contend with a critical event, pull in the staff and subordinate commanders and AAR the information flow, how we can avoid problems in the future, what SOPs and policies need to be implemented or changed, etc. Other areas to AAR: DUIs, suicide attempts or ideations, POV accidents, training or motor pool accidents, ND’s, EoF incidents, loss of sensitive items, maintenance parts flow, ceremonies and social events, etc.

4. Don’t underestimate the power of an AAR in combat. I would submit that a unit that aggressively incorporates AARs in combat is, in essence, a learning organization, and one that will quickly adapt to stay well forward of an enemy’s decision cycle.

An AAR goes far beyond a story board, commander’s inquiry, SIR, or 15-6 investigation. Looking objectively at how an enemy attacked us or vice versa - successfully or otherwise, and how we/they reacted, is an inherent step of IPB, and will allow us to create or modify our TTPs and/or equipment for the betterment of the unit.

5. Investigations as AARs. Like most, you may balk at the premise that investigations can be of enormous benefit to units and Soldiers. You probably think of them as added burdens and unnecessary work that detracts from the current mission, etc. You might even be inclined to nominate mouth-breather investigators as an ‘economy of force’ mission of sorts to preserve combat power. If this be you, than I would submit that you are passing up on a potent opportunity for learning and growth. If done correctly, an investigation can serve as a powerful After Action Review. It should uncover the fundamental root causes of our mistakes – not to merely assign blame or name a scapegoat – but rather to provide the unit with recommendations as to how we can prevent from making those same mistakes again. It can be a frank, humbling, and sometimes invasive look into our systems or lack thereof. Don’t be afraid of investigations and embrace and resource them as tools to make your units better.
6. Don’t forget to share your combat lessons learned with others outside of the organization. It may save Soldiers’ lives. If your unit develops sound TTPs or (authorized(?)) equipment modifications that exploit enemy weaknesses, ensure the word gets out to the rest of the Brigade, and perhaps, if warranted, to the rest of Theater/Army. AWG, CALL, S3-XO Net, branch journal publications, and even good story boards can be great forums for getting the word out quickly. Manage classified information appropriately in this endeavor.

#### **On Occasion, Take a Knee.**

1. When the training schedule allows it, take leave/pass and get away from work. If you think 60 days of saved up leave is a badge of honor, then you need to readjust your priorities. You, your family, and possibly your subordinates may be paying the price in more subtle ways. Remember that your subordinates - the LTs and CPTs - are making life and career decisions and are looking at you and asking themselves “is that what I want to be in 5-10 years?” Set a good example.
2. Getting away from work prevents burn-out and allows you to recharge and apply a fresher perspective to the issues and burdens you will face there upon your return. You may have 500 messages in your ‘in-box’ when you get back, but they are only a ‘select all’ and ‘delete’ key away from continued bliss. If it’s important, they’ll

write you again (this sounds cool, but it's probably a bad idea).

## Chapter V: "Live to Fight another Day"

### Don't Estrange Yourself From Your Senior Rater.

1. In no way is this meant to be a self-aggrandizing or self-promoting tip, and it certainly doesn't imply that you need to be a cheese ball. As field grades - especially deployed field grades - you may find yourself farther and farther removed from your SR (stationed on an isolated JSS, a distant Afghan province, etc.). You may also find yourself stationed in an entirely different country or post than your SR. This is especially true for low-density MOS's. In many regards this is a good thing. It does, however, prevent a person who contributes enormously to your potential professional future from knowing who you are. As a platoon leader or company commander, your reputation was tied directly to the success (or failure) of the unit. If your company did well (i.e. gunnery, CIPs, shucking IED emplacers, clearing routes, seizing objectives, etc.), you were often recognized through association by your SR as a successful leader. As a battalion field grade and member of a staff, these highlights and quantifiable achievements are less linked to you as the S3 or XO, and more associated with the battalion as a whole. Few people would look at a company that just successfully seized an objective and think "wow, I bet that company has a great XO working behind the scenes". In the same regard, few brigade commanders will think "wow, that battalion did well during our Command and Staff, I bet their XO rocks the Kasbah."
2. Of course, a good boss/rater will show off the efforts of deserving majors that contributed to the unit's success, but in many ways you are responsible for adding depth and dimension to a vague name atop an OER on the Brigade Commander's desk once a year. So, how do you do that without being cheesy? Simply enough, through sound, basic Army etiquette. Here are some tips. Don't deliberately avoid your SR: don't head for a port-a-John when his PSD drives through the gate of your JSS. Make it a point to greet him; serve as a guide and show off your unit and its Soldiers to him. At unit social functions, don't isolate yourself and expect your SR to come to you. Be proactive: approach, greet, be courteous and succinct, and then get out of the way. Provide a good OER support form that adds depth to your personality by addressing both professional and personal goals such as family or hobby/sports achievements (i.e. coach Little League, run a half-marathon, spend time with daughter, read This Kind of War, etc.).
3. One of the best ways to be recognized for what you are is to be a team player beyond the span of your own battalion. Besides your boss, the Brigade S3 and XO may provide feedback to the commander as to who supports the team and who doesn't. Both will cherish the selfless battalion FG that aggressively shares ideas, lessons learned, and information throughout - and for the benefit of - the entire brigade.
4. Don't be a stranger, work hard for your unit's and the brigade's successes; your Soldiers and unit will benefit, and you will/should be appropriately recognized when

the time comes.

### **Manage Your Own Career.**

1. No one else will or should care about your career as much as you. Don't expect the Army to manage it for you. Do the math: there's one guy/girl at Branch that manages your file and those of all of your classmates; that's a lot of ORBs to scrub. Is it Branch's responsibility to identify that you have one less AAM on your ORB than in your DA Photo? It would be nice, and on occasion it happens, but that's a tough expectation for most. It took me years to notice on my own ORB that someone had accidentally put 'PAR' as my birthplace instead of 'PA'; I have never set foot in Paraguay.
2. You have an inherent responsibility to know when your career milestones will occur, and to take appropriate action to ensure your information at Branch is accurate and up-to-date. Not doing so is tantamount to shooting yourself in the foot. This includes:
  - Ensuring your latest OER is online (ask your boss whether or not a Complete the Record OER is appropriate for you).
  - Don't let a Captain DA photo go before the LTC promotion board. Nothing convinces a board of your sloth like an outdated or under-ranked photo. Don't be afraid to smile in your photo (I would recommend against a cheesy, full-toothed grin, however). Recent trends indicate that board members tend to look more favorably upon someone who looks like they are happy to go to work verses the look of a glaring, draconian hard-ass. Whom would you rather work for? I also recommend a new Service uniform (ASU) photo as soon as you get to your next duty station. Get one completed *before* you deploy!
  - Translate ORB hieroglyphics. Spend some time with your S1 to make your Section IX - 'Assignment Information' readable at first glance. With the exception of your 'Current' Organization and Duty Title, your S1 can edit all past assignment units and titles. Change HRC gibberish such as '4ARRGT05 HHT RECON' to a more digestible 'HHT, 5<sup>th</sup> SQDN, 4<sup>th</sup> CAVALRY'. Spell out Duty Title acronyms like 'SGI' or 'OC' as well.
  - It's hard - damn hard- to prepare for your board while in theater. Know when your boards will meet, and backwards plan to figure out what you need to get done *before* you deploy. This may include scanning in and sending awards, transcripts, and completed degrees that might not have hit your file as well, and updating your ORB to reflect that you are/were deployed.
  - Once you are convinced that your board file is straight, don't forget to certify the contents. Board members will know whether or not you took the time to do so.
3. Create a "History of Me" book. If you haven't done so already, consolidate and copy everything from PCS/Airborne school orders to AAMs and OERs, and make a 3-ring binder that contains it all. Burn it to a disk and keep that in the book as well. Don't trust that every award and OER will make it into Branch, or that it will stay there. This product will help you immensely every time a board meets.

## **Keep Things in Perspective.**

1. From this point on in your career your reputation will carry more weight than your pure performance. Yes, you must be competent, but you must be more than just good at your job. Being a team player, being genuine, seeing the big picture, shaping your environment, the ability to anticipate problems and manage risk will contribute dramatically towards your reputation as a Field Grade officer. That reputation will percolate up to the BCT CDR who knows from experience that reputation counts and will take it into consideration when deciding whether you will command a battalion as a LTC. The reputation you establish as a FG in your KD jobs will follow you for the next 10 years of your career. Manage this as you fight the day to day fight to make your unit the best it can be.
2. Have no doubt that there are plenty of frustrations and hardships on the immediate horizon, but don't let that distract you from the bigger picture. Like everything in life, especially life in the Army, successful Field-Gradeship requires a careful balance of work, leading Soldiers, caring for family, and maintaining yourself. When asked, many officers confess that the most rewarding aspect of company command was the time spent with and the privilege of leading Soldiers on a daily basis. As a Field-Grade, this opportunity still remains, despite the exponentially increased work load. Don't push it aside to make space for PowerPoint slides and IPRs. Integrate it into your daily battle rhythm, and you will find your time as an XO and S3 to be just as rewarding as your cherished time in command. Have a blast out there, and good luck.

# Notes

---

18-5 Tj Siebold was a good example of this concept.

19-5 Explain your history and impression of the OPS CSM job and define interactions.

24-2 Add CAV to task tracker and follow up.